



save**ON**energy^{OM}
RETROFIT PROGRAM



Online **RETROFIT PROGRAM** Application Training Manual

Version 1.1
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1 About this Training Manual

This training manual is intended to assist representatives of businesses, institutions, government agencies, industrial or multi-residential facilities (known in this manual as “Applicants”) in submitting an online application to the **RETROFIT PROGRAM** via the **saveONenergy** website (saveonenergy.ca). This manual is also intended to assist individuals who are authorized to complete the **RETROFIT** application on behalf of an Applicant such as a contractor or project manager (Applicant Representative).

Examples of potential Applicants to whom this manual is targeted may include:

- Businesses such as retailers, financial institutions and real estate companies
- Buildings such as multi-residential, offices, apartments and condominiums
- Facilities such as sports arenas, farms and warehouses
- Institutions such as municipalities, hospitals and schools
- Industrial sites such as manufacturing/assembly plants, processing operations and water treatment plants
- Others such as places of worship and not-for-profit organizations

This document is not intended for residential customers or transmission-connected customers who may otherwise be eligible under residential or industrial programs.

Application Process Overview:

Using detailed explanations and supporting screen shots, this training manual explains how you, the Applicant or Applicant Representative, are able to:

- Submit a **RETROFIT PROGRAM** application online
- Assign an Applicant Representative to complete the application on your behalf
- Upload pre-project-related information such as manufacturer’s technical sheets, quotes, invoices, tenant education plans, M&V plans etc.
- Receive system generated emails at certain project milestones such as when the project is reviewed and pre-approved by your local electric utility.
- Following project completion, update the project timeline, project costs and scope, and upload documentation to support project completion
- View the status of the project, such as when the final incentive claim is approved

To view a list of the information and supporting documentation required to complete an application online for the **RETROFIT PROGRAM** please see the online **RETROFIT PROGRAM** Application Checklist included in Appendix C of this document.

This training manual does not provide details on the **RETROFIT PROGRAM** eligibility rules and requirements. Please contact your local electric utility to determine if your project is eligible.



2 How to use the Training Manual

This section will help you better understand the **RETROFIT PROGRAM** Application process on the **saveONenergy** website.

1. Table of Contents:

To quickly navigate to a specific section within this training manual, follow the steps detailed below:

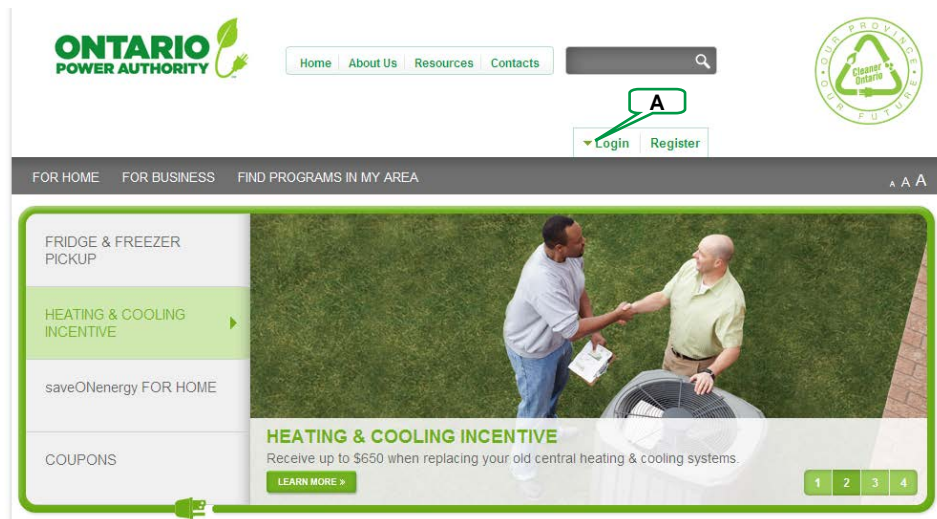
- Go to the Table of Contents
- Identify the section of the manual you would like to navigate to
- Press and hold down the '**Ctrl**' (control) button on your keyboard.
- While holding down the control button, right click on the section you wish to navigate to
- You will then be redirected to the beginning of the selected section of the manual

2. Callouts:

Within this manual, callouts are frequently used to highlight a specific area of a screen shot. Look for these callouts to provide visual guidance in better understanding the instructions provided.

Example: The screen shot below has a callout which indicates where to click in order to register for a new User account. This instruction is found at the top of the screen shot as indicated by the letter 'A'.

A. Click on the '**Register**' tab to create a new User Account.





3. Manual Tips

Throughout this document, you will notice the word 'tips' placed in callouts or bounded by the **saveONenergy** as shown below. Look for these tips to provide further assistance in completing the **RETROFIT PROGRAM** application.

TIP

Login Information

This information is used to create your user account so that you can apply to Programs available to Business, Institutional Government, Industrial or Multi-residential facility Customers.

* Email

* Password

* Re-enter Password

Security Check

[Generate New Image](#)

* Enter the code shown above:

☒ I have read and agree to the [Terms and Conditions](#)

TIP: Your password must be at least 8 characters long, contain at least one number and must have one capital letter.

4. Caution signs

Another symbol used in the manual is the caution sign as shown below. Look for this symbol which highlights items you should pay particular attention to when navigating through the online application process.





3 Program Information Available Online

This section identifies where an interested Applicant would locate information and relevant program documents available for the Business Programs, specifically the **RETROFIT PROGRAM**, on **saveonenergy.ca**.

1. To access information about the **saveONenergy** FOR BUSINESS programs, an Applicant has the option of clicking either of the below identified links available on saveonenergy.ca.
 - A. **FOR BUSINESS**
 - B. **FOR BUSINESS**

The screenshot shows the saveONenergy.ca website. At the top, there is a navigation bar with links: Home, About Us, Resources, and Contacts. A search bar is located to the right of these links. Below the navigation bar, there is a section for 'FOR HOME', 'FOR BUSINESS', and 'FIND PROGRAMS IN MY AREA'. A callout box labeled 'A' points to the 'FOR BUSINESS' link. Below this, there is a large banner for the 'HEATING & COOLING INCENTIVE' program, which offers up to \$650 when replacing old central heating & cooling systems. A callout box labeled 'B' points to the 'FOR BUSINESS' link in the navigation bar. Below the banner, there are four sections: 'FOR HOME', 'FOR BUSINESS', 'Kids' Corner', and 'Efficiency Tips & Tools'. Each section has a brief description and a 'LEARN MORE' link.

2. To locate information about the **RETROFIT PROGRAM**, click on the 'RETROFIT PROGRAM' link located on the left navigation bar.



For Business

DEMAND RESPONSE

SMALL BUSINESS LIGHTING

RETROFIT PROGRAM

AUDIT FUNDING

HIGH PERFORMANCE NEW CONSTRUCTION

PROCESS AND SYSTEMS

Training Opportunities

NEW HOME CONSTRUCTION

Social and Assisted Housing

2

Sectors

Businesses across Ontario can benefit from an array of programs offered throughout the province. There are energy-efficiency programs to assist organizations from the smallest of retail stores to the largest industrial complexes. Programs to help fund energy audits, to replace energy-wasting equipment or to pursue new construction that exceeds our existing codes and standards. Businesses can also pursue incentives for controlling and reducing their electricity demand at specific times. The bottom line is that there are innovative programs that can help businesses reduce their electricity costs, while helping Ontario defer the need to build new generation and reduce its environmental footprint.

Commercial



Take advantage of financial incentives to lower your electricity costs

Select ...

[VIEW ALL](#)

Industrial



Energy Efficiency – An organization imperative for today's Industrial Facilities

Select ...

[VIEW ALL](#)

Government



Take advantage of energy conservation incentives for the heart of your community

Select ...

[VIEW ALL](#)

Agriculture



Agricultural operations can benefit from financial incentives by lowering their electricity costs

Select ...

[VIEW ALL](#)

Small Business



Get more out of your energy dollar with financial incentives from your local electric utility

Select ...

Institutional



Across the province, schools, health-care organizations and other institutions are exploring ways to use electricity more efficiently



3. For those who are not as familiar with the available Business Programs, using the sector based page as shown below, an Applicant can select the sector which pertains to their business. Based on this selection, a list of available programs will be displayed.
4. An Applicant clicks on the appropriate drop-down menu for their business sector to further specify their business type.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business

DEMAND RESPONSE
SMALL BUSINESS LIGHTING
RETROFIT PROGRAM
AUDIT FUNDING
HIGH PERFORMANCE NEW CONSTRUCTION
PROCESS AND SYSTEMS
Training Opportunities
NEW HOME CONSTRUCTION
Social and Assisted Housing

Find Programs in My Area
Key in the six characters of your postal code.
Go

Sectors

Businesses across Ontario can benefit from an array of programs offered throughout the province. There are energy-efficiency programs to assist organizations from the smallest of retail stores to the largest industrial complexes. Programs to help fund energy audits, to replace energy-wasting equipment or to pursue new construction that exceeds our existing codes and standards. Businesses can also pursue incentives for controlling and reducing their electricity demand at specific times. The bottom line is that there are innovative programs that can help businesses reduce their electricity costs, while helping Ontario defer the need to build new generation and reduce its environmental footprint.

Commercial

Take advantage of financial incentives to lower your electricity costs

Select ...
Select ...
Large-Office
Small-Office
Large-Retail
Small-Retail
Multi-Family-Condo
Warehouses
New-Residential-Construction

Industrial

Energy Efficiency – An organization imperative for today's Industrial Facilities

Select ...

VIEW ALL

Agriculture



5. To locate information about the **RETROFIT PROGRAM**, an Applicant can click on the 'LEARN MORE>>' link located under **RETROFIT PROGRAM** heading.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Commercial > Large Office

Commercial

- Large Office
- Small Office
- Large Retail
- Small Retail
- Multi-Family/Condo
- Warehouses
- New Home Construction

Large office

Available **saveONenergy** for Business programs

DEMAND RESPONSE
DEMAND RESPONSE is a program that compensates eligible industrial and commercial businesses for reducing their electricity demand during peak times.
[LEARN MORE >>](#)

RETROFIT PROGRAM
RETROFIT PROGRAM incentives of up to 50 per cent of project costs will be available for pre-approved retrofits for commercial, industrial, government, social housing and municipal facilities that result in electricity savings.
[LEARN MORE >>](#)

HIGH PERFORMANCE NEW CONSTRUCTION
HIGH PERFORMANCE NEW CONSTRUCTION is a program that will provide design assistance and substantial financial incentives for new construction and major renovations projects that exceed the Ontario Building Code.
[LEARN MORE >>](#)

AUDIT FUNDING
Incentives are available to conduct electricity-focused audits of facilities of all sizes.
[LEARN MORE >>](#)

Use new technologies to save electricity and lower your business costs!

Large office buildings are the single largest users of electricity in Ontario's commercial sector and they can play an important role in advancing energy efficiency. While no two buildings are exactly alike, all commercial buildings consume energy through lighting systems, office equipment, air conditioning and heating. More and more commercial building owners and facility managers are tackling energy efficiency in their existing office buildings and using both old and new technologies in new construction to save energy costs and improve their bottom line. Electricity is one of the most easily controlled costs. Your local electric utility can assist you to assess and implement energy-efficiency measures within your business that could lower your electricity costs almost immediately in some cases and last far into the future.

Building types
Owners, operators or tenants of buildings are eligible for incentives. Building types include:



6. Prior to beginning a **RETROFIT PROGRAM** application, it is recommended that an Applicant review the relevant program documents. To access these documents, click on the '**Relevant Documents**' link located on the left navigation bar as shown in the screen shot below.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

DEMAND RESPONSE
SMALL BUSINESS LIGHTING
RETROFIT PROGRAM
Relevant Documents
AUDIT FUNDING
HIGH PERFORMANCE NEW CONSTRUCTION
PROCESS AND SYSTEMS
Training Opportunities
NEW HOME CONSTRUCTION
Social and Assisted Housing

saveONenergy[™] RETROFIT PROGRAM

RETROFIT PROGRAM

Install Energy-Efficient Measures and Earn up to 50% of your Project Costs

For many business owners, capital costs prove to be the primary barrier to investing and participating in a retrofit. The **RETROFIT PROGRAM**'s incentives tackle this barrier head on, making it possible for you to install and benefit from newer, more energy-efficient solutions.

Focus your Energy-Efficiency Decisions on your Building Retrofits

Becoming more energy-efficient is paying off for commercial organizations looking to respond to growing market pressures and increased global competition. Operating as efficiently as possible will help improve your bottom line. Even small steps can make a measurable difference.

Participate and Save

The **RETROFIT PROGRAM** provides substantial financial incentives for replacing existing equipment with high efficiency equipment and for installing new control systems that will improve the efficiency of your operational procedures and processes.

Incentive Levels

Your local electric utility can assist you to assess and offer financial incentives to implement energy-efficiency measures for your building, equipment and operational practices that could lower your electricity costs almost immediately in some cases and last far into the future in others.



The relevant program documents for the **RETROFIT PROGRAM** are available for download as displayed in the screen shot below.

The screenshot shows the Ontario Power Authority website. At the top, there is a navigation bar with links for Home, About Us, Resources, and Contacts, along with a search bar. Below this is a secondary navigation bar with links for Login and Register. The main content area is titled "For Business > Programs > RETROFIT PROGRAM > Relevant Documents". On the left, there is a sidebar with a list of program categories: DEMAND RESPONSE, SMALL BUSINESS LIGHTING, RETROFIT PROGRAM (highlighted), AUDIT FUNDING, HIGH PERFORMANCE NEW CONSTRUCTION, PROCESS AND SYSTEMS, Training Opportunities, NEW HOME CONSTRUCTION, and Social and Assisted Housing. The main content area features a green header for the "saveONenergy[™] RETROFIT PROGRAM". Below this, it says "Please Find Relevant RETROFIT PROGRAM Documents Below:". The documents are listed in five categories: 1. Participant Agreement and Eligibility (Retrofit - Participant Agreement.pdf, Retrofit - Eligibility.pdf), 2. Prescriptive Worksheets (10 files), 3. Qualifying Lists for Agribusiness Prescriptive Measures (3 files), 4. Engineered Worksheets (6 files), 5. Custom Worksheet and M&V Procedures (2 files), and 6. Tenant Education Incentives (1 file). The footer contains a copyright notice for 2010 Ontario Power Authority.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS ▼

For Business > Programs > RETROFIT PROGRAM > Relevant Documents

DEMAND RESPONSE

SMALL BUSINESS LIGHTING

RETROFIT PROGRAM

Relevant Documents

AUDIT FUNDING

HIGH PERFORMANCE NEW CONSTRUCTION

PROCESS AND SYSTEMS

Training Opportunities

NEW HOME CONSTRUCTION

Social and Assisted Housing

saveONenergy[™] RETROFIT PROGRAM

Please Find Relevant RETROFIT PROGRAM Documents Below:

- Participant Agreement and Eligibility
 - [Retrofit - Participant Agreement.pdf](#)
 - [Retrofit - Eligibility.pdf](#)
- 1. Prescriptive Worksheets:
 - [RETROFIT-Lighting-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Unitary-AC-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Agribusiness-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Motors-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Multi-Residential-In-suite-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Synchronous-Belt-Eligible-Measure-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Variable-Frequency-Drive-Eligible-Measures-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-AEM-Service-Hot-Water-Eligible-Measures-Worksheet--v1-0--March-2011_for-the-web.xlsx](#)
- 2. Qualifying Lists for Agribusiness Prescriptive Measures:
 - [RETROFIT-Qualifying-list-for-Exhaust-Fans--V1-0--March-2011.pdf](#)
 - [RETROFIT-Qualifying-list-for-Creep-Heat-Controllers--V1-0--March-2011_WEB.pdf](#)
 - [RETROFIT-Qualifying-list-for-High-Temperature-Cutout-Thermostats--V1-0--March-2011_WEB.pdf](#)
- 3. Engineered Worksheets:
 - [RETROFIT-Commercial-Directional-Lighting-Eng-Worksheet-V1-0-March-2011-WEB.XLS](#)
 - [RETROFIT-Commercial-High-Bay-Lighting-Eng-Worksheet--V1-0--March-2011--WEB.xls](#)
 - [RETROFIT-Commercial-Interior-Lighting-Worksheet-110224.xls](#)
 - [RETROFIT-Compressed-Air-Worksheet-110224.xls](#)
 - [RETROFIT-Unitary-AC-Worksheet-110225.xls](#)
 - [RETROFIT-VSD-on-Fan-Worksheet-110224.xls](#)
 - [RETROFIT-VSD-on-Pump-Worksheet-110224.xls](#)
- 4. Custom Worksheet and M&V Procedures:
 - [RETROFIT-Custom-Worksheet--v1-0--March-2011_WEB.xls](#)
 - [RETROFIT-Project-M-V-Procedures--v1-1--March-2011.pdf](#)
- 5. Tenant Education Incentives:
 - [RETROFIT-Tenant-Education-Proposal-Options.pdf](#)

Home | About Us | Contacts | Site Map | Privacy | Terms of Use | Marks

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4 Creating a New User Account

This section provides an overview of the process an Applicant undertakes when registering for a user account on **saveonenergy.ca**. A user account is required if the Applicant wishes to access and submit a **RETROFIT PROGRAM** application.

A. Click on the 'Register' tab to create a new User Account.

The screenshot shows the Ontario Power Authority website. At the top left is the 'ONTARIO POWER AUTHORITY' logo. To its right are navigation links: Home, About Us, Resources, and Contacts. A search bar is located to the right of these links. On the far right is a circular logo with a recycling symbol and the text 'OUR PROVINCE', 'Cleaner Ontario', and 'OUR FUTURE'. Below the navigation links are 'Login' and 'Register' buttons. A green callout bubble with the letter 'A' points to the 'Register' button. Below the navigation bar is a horizontal menu with 'FOR HOME', 'FOR BUSINESS', and 'FIND PROGRAMS IN MY AREA'. The main content area features a large banner for the 'HEATING & COOLING INCENTIVE' program, which includes a photo of two men shaking hands over a large air conditioning unit. To the left of the banner is a sidebar with links to 'FRIDGE & FREEZER PICKUP', 'HEATING & COOLING INCENTIVE', 'saveONenergy FOR HOME', and 'COUPONS'. Below the banner are four columns of content: 'FOR HOME' (with a photo of a group of people), 'FOR BUSINESS' (with a photo of industrial buildings), 'TV Commercial' (with a photo of a family), and 'Efficiency Tips & Tools' (with a photo of a woman and a child). Each column has a brief description and a 'LEARN MORE' link. At the bottom of the page is a footer with links to Home, About Us, Contacts, Site Map, Privacy, Terms of Use, and Marks, followed by copyright information: '© 2010 Ontario Power Authority. All rights reserved. Official Marks of the Ontario Power Authority'.



- B. Select the 'I am a Business, Institution, Government, Industrial or Mult-Residential Facility Applicant and/or I am an Applicant Representative (Contractors/Supplier)' option and click 'Next' to proceed with the User Account Registration Process.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Register

Register with us to access our on-line application forms. You're on your way to receiving great incentives for saving energy for your home and business. When registering for the first time read our [privacy policy](#) and select from the options below:

☐ I am a Residential Home Builder or Renovator (for SaveONenergy NEW HOME CONSTRUCTION)

☒ I am a Business, Institution, Government, Industrial or Mult-Residential Facility Applicant and/or I am an Applicant Representative (Contractors/Supplier) [Help](#)

Note: All Business & Industrial customers interested in participating in the Demand Response Program should contact their local electric utility. For more information, please [click here](#).

Large industrial customers interested in participating in the Process & Systems Program should contact their local electric utility. For more information, please [click here](#).

For help with registration or with questions regarding the application process, please contact your local electric utility.

Next

- C. In order to register for a new User Account, all required fields noted with an asterisk (*) must be completed, the user must accept to the *Terms and Conditions* then click the 'Register' button located at the bottom of the screen.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

▼ Login Register

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

User Account Registration

If you are an [Applicant](#) or [Applicant Representative](#), please complete the user account registration for your own company. If you are an Applicant, the information provided here will be used to populate the Application.

Mandatory fields are marked with an asterisk (*).

Your Company Details

* Company Name (Full Legal Name)

Bob's Business

Company Website

www.bobbusiness.com



Your Contact Details

Title

Mr

* First Name

Bob

* Last Name

Brown

* Phone Number

416-999-9999

Alternate Phone Number

647-111-2222

Address

* Address Line 1

6 Bloor

Address Line 2 (optional)

Address Line 3 (optional)

* Street Type

Street

Street Direction

Select ...

Unit/Suite/Apt

Suite 1800

* City

Toronto

* Province

Ontario

* Country

Canada

* Postal Code

M1J 3H9

Login Information

This information is used to create your user account so that you can apply to Programs available to Business, Institutional Government, Industrial or Multi-residential facility Customers.

* Email

bobbrownsbusiness@gmail.com

* Password

••••••••

* Re-enter Password

••••••••

Security Check



[Generate New Image](#)

* Enter the code shown above:

☒ I have read and agree to the [Terms and Conditions](#)

Register

[Cancel](#)

TIP: Your password must be at least 8 characters long, contain at least one number and must have one capital letter.

TIP: The Security Code is case sensitive. Prior entering the code, if you cannot decipher the characters, click 'Generate New Image'. Once you begin entering the code, this link will disappear.



Note: The system is not currently configured to generate an email as detailed in the screen shot below. A user can immediately login to their user account after receiving this message.

The screenshot shows the Ontario Power Authority website. At the top left is the Ontario Power Authority logo. To its right are navigation links: Home, About Us, Resources, and Contacts. Further right is a search bar. On the top right is the Cleaner Ontario logo. Below the navigation bar is a dark grey bar containing links for 'Login' and 'Register'. Below this is a dark grey bar with the text 'FOR HOME', 'FOR BUSINESS', and 'FIND PROGRAMS IN MY AREA'. The main content area has a heading 'Registration for Business & Industrial Customers'. Below the heading is a message: 'Your account has been successfully created. A confirmation message has been sent to the email address you provided during the registration process. Any time you return to the website, you can click the Login button above to sign into your account directly.' A green callout box with the text 'Click here to Login' has an arrow pointing to the 'Login' button in the dark grey bar.

ONTARIO POWER AUTHORITY

[Home](#) | [About Us](#) | [Resources](#) | [Contacts](#)

[Login](#) [Register](#)

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Registration for Business & Industrial Customers

Your account has been successfully created. A confirmation message has been sent to the email address you provided during the registration process.

Any time you return to the website, you can click the Login button above to sign into your account directly.

Click here to Login



5 Logging into your User Account

Once an Applicant has successfully registered for a User Account, they may login to access the online **RETROFIT PROGRAM** application.

- A. The email address and password provided during the User Account Registration Process are used to log into the system and access the online **RETROFIT PROGRAM** application.

The screenshot shows the Ontario Power Authority website's Login page. At the top, there is a navigation bar with the Ontario Power Authority logo on the left, a search bar, and links for Home, About Us, Resources, and Contacts. Below this is a secondary navigation bar with links for Login and Register. The main content area is titled 'Login' and includes a message: 'To complete a project application for incentives you must first register before you can log in. Please register by clicking on the [Register link](#).' Below this message, there are two required fields: 'Email' and 'Password'. The Email field contains the text 'bobbrownsbusiness@gmail.com'. The Password field is masked with dots. A 'LOGIN' button is located below the password field. The footer of the page contains the text 'FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA' and a small 'A A A' icon.



6 User Account Landing Page

After successfully logging in to your User Account using the e-mail address and password specified during User Account Registration Process, the Applicant will be able to access the following Account Summary Page:

- A. The **'Programs available to you'** section indicates which programs an Applicant can submit an online application for. If a program is not listed under this heading, then a paper application can be submitted directly to the local electric utility.
- B. View the **'Account Details'** which includes all the information provided by the Applicant during the User Account Registration Process.
- C. Edit your User Account information by clicking **'EDIT ACCOUNT DETAILS>>'**.
- D. View a list of all applications the Applicant has started under **'Status of your Applications'**
- E. Under the **'Actions'** heading, the webpage will display the actions available to the Applicant based on the status. For example, if the status is **'Pre-Project Submission – Submitted to LDC for Approval'** the Applicant only has the ability to **'View'** a summary of the application as shown in the screen shot above.



- F. To learn more about a program, select the '**LEARN MORE>>**' link located under the '**Programs available to you**' heading. The Applicant will be directed to the landing page where further details about the selected program are available.
- G. To begin an online application, click the **Get Started>>** button located under the program name.
- H. The Applicant may select '**Logout**' at anytime to exit their user account.
- I. To close a user account, select '**CLOSE ACCOUNT>>**' which will deactivate any applications previously submitted or saved as draft.

If you decide to close your user account, the webpage will display a confirmation message prior to closing the account as shown in the screen shot below.

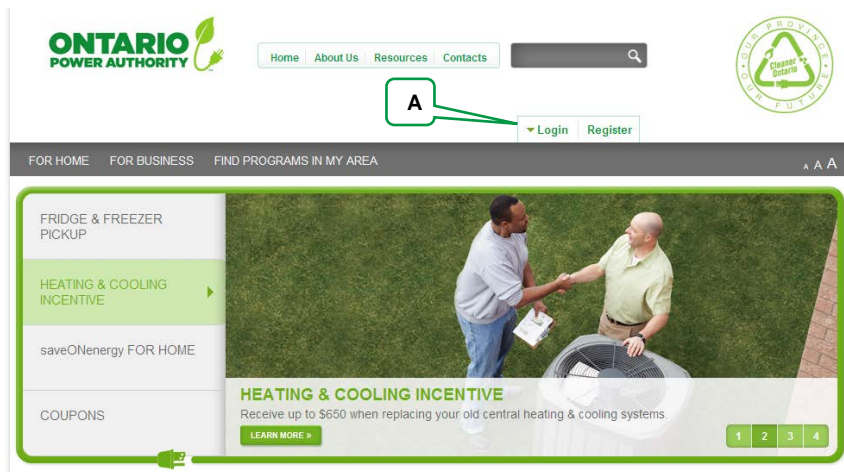
The screenshot shows the Ontario Power Authority website interface. At the top, there is a navigation bar with the Ontario Power Authority logo, a search bar, and links for Home, About Us, Resources, and Contacts. Below this is a secondary navigation bar with links for Account Summary, Bob Brown, and Logout. The main content area is titled 'Welcome Back Bob Brown'. On the left, under 'Account Details', the user's name 'Bob Brown' and address '6 Bloor Street Suite 1800, Toronto, Ontario M1J3H9, Canada' are listed, along with links for 'EDIT ACCOUNT DETAILS >>' and 'CLOSE ACCOUNT >>'. On the right, under 'Programs available to you', there is a list of programs including 'SMALL BUSINESS LIGHTING' with links for 'LEARN MORE >>' and 'GET STARTED >>'. A modal dialog box titled 'Message from webpage' is displayed in the center, asking 'Are you sure you wish to close your account? Note: This cannot be reversed.' with 'OK' and 'Cancel' buttons.



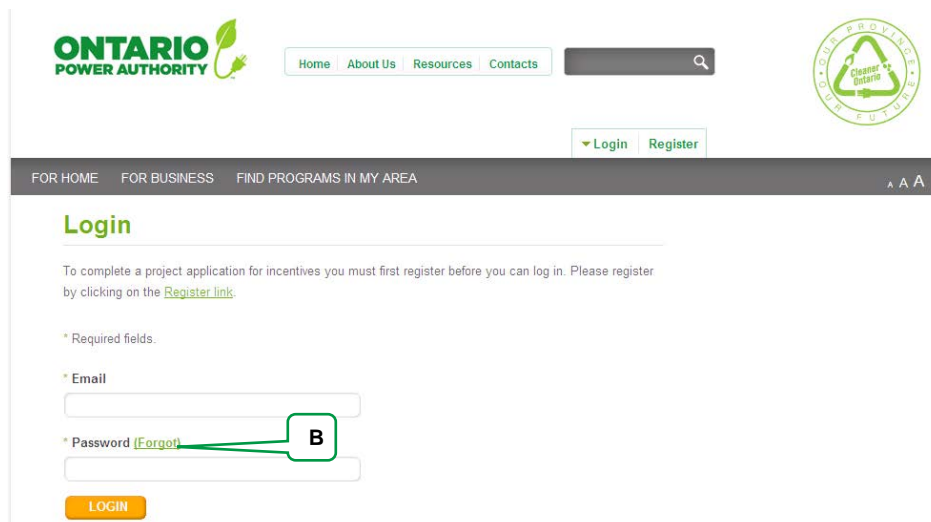
7 How to reset your password

If you forgot your password which was selected during the User Account Registration Process which is used to log into your **saveONenergy** user account, follow the steps below to reset it.

A. Click the **'Login'** button as shown in the screen shot below.



B. Click the **'Forgot'** hyperlink located beside the **'Password'** heading





C. Enter the email address associated with your user account and click 'Submit'

ONTARIO POWER AUTHORITY

Home About Us Resources Contacts

▼ Login Register

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Forgot Password

Enter the email address associated with your account.

bobbrownsbusiness@gmail.com

Submit Cancel

C

D. You will be directed to the following confirmation page

ONTARIO POWER AUTHORITY

Home About Us Resources Contacts

▼ Login Register

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Forgot Password

An email has been sent to your account.

E. Login to your email account in order to access the system generated email which you will need in order to reset your password.

New Password Creation for SaveOnEnergy.ca - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward

From: ceco@powerauthority.on.ca

To: 'bobbrownsbusiness@gmail.com'

Cc:

Subject: New Password Creation for SaveOnEnergy.ca

Please create your new password by clicking on the link below and subsequently confirm your newly created password.

<https://saveonenergy.ca/Account/Reset-Password.aspx?ProfileId=0e748578-7b90-e...>

TIP: If you do not receive this email in your inbox, check your junk mail box. Also check with your IT department to see if this email address is white listed.



- F. Copy the URL provided in the email and paste it into a new web browser. This URL link is unique to your user account.
- G. The system will prompt you to enter a new password twice as shown below

- H. Once you have finished entering a new password, click '**Submit**'
- I. You will be directed to a page confirming that your password has been reset as shown below.

- J. Click the '**Login**' button as shown above to log into your account using the new password.



8 Starting a RETROFIT PROGRAM Application

- A. The Applicant must first login using the email address and password provided during the User Account Registration Process as detailed in Section 3.
- B. Once you login to your User Account, you will be directed to the main user account landing page. From here, click the **'GET STARTED >>'** link located under the **'RETROFIT PROGRAM'** heading in order to begin the online application process.

The screenshot displays the user account landing page for Bob Brown. At the top, the Ontario Power Authority logo is on the left, and navigation links (Home, About Us, Resources, Contacts) and a search bar are in the center. On the right is the Cleaner Ontario logo. Below the navigation bar, there's a section for 'Account Summary' with links for 'Bob Brown' and 'Logout'. A dark grey bar contains links for 'FOR HOME', 'FOR BUSINESS', and 'FIND PROGRAMS IN MY AREA', along with font size controls (A A A). The main heading is 'Welcome Back Bob Brown'. Under 'Account Details', Bob Brown's address is listed, with links for 'EDIT ACCOUNT DETAILS >>' and 'CLOSE ACCOUNT >>'. Below this is the 'Status of your Applications' section. To the right, the 'Programs available to you' section lists 'RETROFIT PROGRAM' and 'SMALL BUSINESS LIGHTING'. Under 'RETROFIT PROGRAM', there are links for 'LEARN MORE >>' and 'GET STARTED >>'. A callout box labeled 'B' points to the 'GET STARTED >>' link.



- C. You will be prompted to enter the 6 digit postal code of your project location then click **Search** to proceed. Based on the postal code entered, the system will determine the local electric utility which is registered to deliver the **RETROFIT PROGRAM**.

Find programs in my area

FOR HOME:

Please enter your full six digit postal code to help you find your local electric utility.

FOR BUSINESS:

Please enter the six digit postal code of your project location to see if the program is offered by the local electric utility.

*Enter full postal code:

M4L 3J1

Search OR [click here to view all utility companies](#)

TIP

*If your local electric utility has not registered for the **RETROFIT PROGRAM**, you will not be able to proceed in the online Application Process and will receive the below message. If you receive this message, please contact your local electric utility. This contact information is available at <https://saveonenergy.ca/Home/Contacts.aspx>.*



[Home](#) | [About Us](#) | [Resources](#) | [Contacts](#)



Account Summary

Bob Brown | [Logout](#)

[PROGRAMS](#) | [CASE STUDIES](#) | [SECTORS](#) ▼

AAA

For Business > Programs > RETROFIT PROGRAM

Program Availability

Currently, your Local Electric Utility does not offer this program. For more information about programs offered in your area, please contact your Local Electric Utility company.

[Return Home](#)



- D. Based on the postal code entered, the system will determine the local electric utility which services your project location.
- E. If the webpage displays the correct local electric utility, click **`Yes, this is my utility company`** to proceed in the application process.
- F. If not, click **`Select a different utility company`** to view a complete list of all the utilities at which point you can then select the appropriate local electric utility from.

The screenshot shows the Ontario Power Authority website. At the top left is the 'ONTARIO POWER AUTHORITY' logo. To its right are navigation links: Home, About Us, Resources, and Contacts. Further right is a search bar. On the top right is the 'Cleaner Ontario' logo. Below the navigation links is a user account section with 'Account Summary', 'Bob Brown', and 'Logout' links. A main navigation bar contains 'PROGRAMS', 'CASE STUDIES', 'FIND PROGRAMS IN MY AREA', and 'SECTORS'. Below this bar, the breadcrumb 'For Business > Find Programs in My Area' is visible. The main heading is 'Your Utility Company'. Below it, the text reads 'Based on your Postal Code your Utility Company is:'. The determined utility is 'Toronto Hydro-Electric System Limited'. There are two buttons: 'Yes, this is my utility company' (highlighted in orange) and 'Select a different utility company' (a green link). Callout box E points to the 'Select a different utility company' link, and callout box F points to the 'Yes, this is my utility company' button. The footer contains links for Home, About Us, Contacts, Site Map, Privacy, Terms of Use, and Marks, along with a copyright notice for 2010.



9 Step 1: Authorization

The authorization section is the first of four sections of the **RETROFIT PROGRAM** application process.

- A. The tabbed progress bar of the application process located at the top of the screen will help identify the section you are completing as you navigate through the online application.

PROGRAMS CASE STUDIES SECTORS ▼

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit
<div><div></div><div></div></div>			

All worksheets, appendices and supporting documentation for your Project(s) must be uploaded. Incomplete Applications will not be processed and will not be approved by your local electric utility. The Applicant must signify its acceptance of the Terms and Conditions of this Application (the "Application") and the accompanying Participant Agreement (together, the "Agreement") before submitting to your local electricity distribution company (the "LDC").

PRIOR TO commencing your Project(s)
- Ensure that the LDC has accepted this Application and your Participant Agreement

AFTER completing your project
- You must submit evidence of Project completion in order to receive your Participant Incentive

To the Applicant: ALL REQUIRED fields which are marked with an asterisk (*) must be completed in order for the Application to be accepted for review by the LDC. See the Participant Agreement for defined terms. For Head Office Applications, you will have the opportunity to add additional building sites once you complete the entire Application.

The following questions will help identify you as either the Applicant or the Applicant Representative. Both the Applicant and Applicant Representative must have registered for a user account before they can be designated within the following pages of 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.**

*Are you the building owner or lessee or have contractual authority to bind the owner or lessee? If so, you will be considered the Applicant in this Application.
☐ Yes ☒ No

*Have you been designated as the Applicant Representative by the Applicant for the purposes of assisting in the completion of the Application? If so, you will be considered the Applicant Representative in this Application.
☐ Yes ☒ No

TIP

To learn more about whether your Retrofit project is eligible, please click [here](#) for more information.

Please click [here](#) to view the Terms and Conditions for this Program. You will be required to accept the Terms and Conditions prior to submitting your Application Form.

TIP 1

*It is recommended that the Applicant views the **RETROFIT PROGRAM Eligibility** criteria prior to starting the application process to determine if the project is eligible. This document contains project eligibility requirements such as the minimum incentive requirements etc.*

TIP 2

*Prior to submitting a **RETROFIT PROGRAM Application**, the Applicant must accept to the Participant Agreement. It is also recommended that the Applicant review these terms prior to starting the application process.*



9.1 Assigning an Applicant Representative

An Applicant may assign an Applicant Representative (AR) to complete a **RETROFIT PROGRAM** Application on their behalf. An Applicant Representative could be someone internal to the Applicant's company, or someone from an external supplier such as a contractor or project manager who is authorized to complete the application on behalf of the Applicant.

There are two options to assign an Applicant Representative:

Option 1: The Applicant initiates the **RETROFIT PROGRAM** Application Process and assigns an Applicant Representative.

Option 2: The Applicant Representative initiates the **RETROFIT PROGRAM** Application Process and identifies the Applicant.

To successfully assign an Applicant Representative using either option 1 or option 2 as described above, both the Applicant and Applicant Representative must have existing User Accounts. 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.



9.1.1 Option 1: Applicant Assigns Applicant Representative

To assign an Applicant Representative to complete the **RETROFIT PROGRAM** Application process on behalf of the Applicant, follow the steps detailed below.

- A. Within the '**Authorization**' section of the **RETROFIT PROGRAM** Application process, select the answers to the questions as shown in the screen shot below and click '**Next**' to proceed.

The screenshot shows the 'saveONenergy RETROFIT PROGRAM Application' interface. At the top, there's a navigation bar with 'Home', 'About Us', 'Resources', and 'Contacts'. Below this is a search bar and a user account section for 'Bob Brown' with a 'Logout' link. The main navigation bar includes 'PROGRAMS', 'CASE STUDIES', and 'SECTORS'. The breadcrumb trail reads 'For Business > Programs > RETROFIT PROGRAM'. The title of the page is 'saveONenergy RETROFIT PROGRAM Application'. Below the title is a progress bar with four steps: 'Authorization' (selected), 'Third Party Contributions, Contacts and Representatives', 'Site and Project Details', and 'Confirm and Submit'. The 'Authorization' section contains the following text:

All worksheets, appendices and supporting documentation for your Project(s) must be uploaded. Incomplete Applications will not be processed and will not be approved by your local electric utility. The Applicant must signify its acceptance of the Terms and Conditions of this Application (the "Application") and the accompanying Participant Agreement (together, the "Agreement") before submitting to your local electricity distribution company (the "LDC").

PRIOR TO commencing your Project(s)
- Ensure that the LDC has accepted this Application and your Participant Agreement

AFTER completing your project
- You must submit evidence of Project completion in order to receive your Participant Incentive

To the Applicant: ALL REQUIRED fields which are marked with an asterisk (*) must be completed in order for the Application to be accepted for review by the LDC. See the Participant Agreement for defined terms. For Head Office Applications, you will have the opportunity to add additional building sites once you complete the entire Application.

The following questions will help identify you as either the Applicant or the Applicant Representative. Both the Applicant and Applicant Representative must have registered for a user account before they can be designated within the following pages of 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.**

*Are you the building owner or lessee or have contractual authority to bind the owner or lessee? If so, you will be considered the Applicant in this Application.
☒ Yes ☐ No

*Will you be assigning an Applicant Representative to complete this Application Form on your behalf? [Help](#)
☒ Yes ☐ No

To learn more about whether your Retrofit project is eligible, please click [here](#) for more information.

Please click [here](#) to view the Terms and Conditions for this Program. You will be required to accept the Terms and Conditions prior to submitting your Application Form.

At the bottom of the form, there is a green speech bubble with the letter 'A' pointing to an orange 'Next' button.



The Applicant must complete the '**Third Party Contributions**' question as the Applicant Representative will not have the opportunity to do so once they are assigned to complete the **RETROFIT PROGRAM** application. Please see Sections 9 of this training manual for guidance on completing this section.

- B. The webpage will display the Applicant's company details and contact information as shown in the screen shot below. These fields are not editable at this point in the application process. To edit any of these fields, return to your main user account landing page.

ONTARIO POWER AUTHORITY

Home About Us Resources Contacts

Account Summary
Bob Brown Logout

PROGRAMS CASE STUDIES SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization **Third Party Contributions, Contacts and Representatives** Site and Project Details Confirm and Submit [Save and return at a later date](#)

Third Party Contributions

* Have you received any other financial incentive(s) for this project through your local electric utility or any other public program?

☐ Yes ☒ No

The information below was previously provided during the User Account Registration process. To edit any of these fields, please return to your Account Summary page by clicking on your name located on the top right hand corner of this page, beside the 'Logout' button. Once you're on the Accounts Summary page, click "Edit Account Details".

Applicant's Company Details

* Company Name (Full Legal Name)
Bob's Business

Company Website
www.bobbusiness.com

Applicant Contact Details

Title (Mr. Miss Mrs.)
Mr

* First Name
Bob

* Last Name
Brown

* Phone Number
4169999999

Alternate Phone
6471112222

Fax



Applicant Identification

* Email Address

bobbrownsbusiness@gmail.com

Address

* Address Line 1

6 Bloor

Address Line 2 (optional)

Address Line 3 (optional)

☐ Lives Outside of Canada

* Street Type

Street

Street Direction

Select ...

* City

Toronto

* Province


Ontario

* Postal Code

M1J3H9

Next

- C. Enter the email address of the Applicant Representative who will be assigned to complete the application and click **'Search'**.



Home | About Us | Resources | Contacts

Account Summary
Bob Brown | Logout

PROGRAMS | CASE STUDIES | FIND PROGRAMS IN MY AREA | SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization

Third Party Contributions, Contacts and Representatives

Site and Project Details

Confirm and Submit

Save and return at a later date

Applicant Representative Identification

Please enter the email address of the Applicant Representative. The Applicant Representative must have registered for a user account before they can be designated in this application. Once the application is completed, you will be notified by email. You will be asked to login to your user account to approve and submit the application to their local electric utility.

* Email Address

ABCconsultingfirm@gmail.com

Search

C



- D. The webpage will display the name and company associated with the specified email account as shown in the screen shot below.

The screenshot shows the 'saveONenergy RETROFIT PROGRAM Application' webpage. The page has a header with the Ontario Power Authority logo and navigation links. The main content area is titled 'Applicant Representative Identification'. It includes a search bar with the email 'ABCconsultingfirm@gmail.com' and a 'Search' button. A search results window is open, displaying the name 'John Smith' and the company 'ABC Consulting Firm'. A green callout 'D' points to the search results, and a green callout 'E' points to the 'Yes' button. The page also features a 'Save and return at a later date' button and a 'Logout' link.

- E. If the webpage displayed the correct information for the Applicant Representative, select 'Yes' to proceed with the application process.



- F. The webpage will then display the contact information associated with the email address entered for the Applicant Representative as shown in the screen shot below.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS ▾

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit	Save and return at a later date
---------------	--	--------------------------	--------------------	---------------------------------

Applicant Representative Identification

Please enter the email address of the Applicant Representative. The Applicant Representative must have registered for a user account before they can be designated in this application. Once the application is completed, you will be notified by email. You will be asked to login to your user account to approve and submit the application to their local electric utility.

* Email Address

Pressing the 'Clear' button will allow you to re-enter a different email address and Applicant Representative information. Once you enter this information and hit 'Next' below you will not be able to change the Applicant Representative for this application.

Clear

Tip: Click 'Clear' to search for a new Applicant Representative.

Applicant Representative

Title (Mr. Miss Mrs.)

* First Name

* Last Name



Contact Details

* Phone Number

4169991234

Alternate Phone Number

Fax

Address

* Address Line 1

7 Road

Address Line 2 (optional)

Address Line 3 (optional)

☐ Lives Outside of Canada

* Street Type

Walk

Street Direction

Select ...

* City

Toronto

* Province

Ontario

* Postal Code

M4L2J1

* Company Name

ABC Consulting Firm

Previous

Next



It is important to confirm that the correct Applicant Representative is assigned to the application because once the user clicks '**Next**' to proceed in the application process; *you cannot change the Applicant Representative assigned to this application.*



- G. At this point in the process, the Applicant Representative has been successfully assigned to the **RETROFIT PROGRAM** application. The system will generate an email notification to the Applicant Representative notifying them of this. The Applicant can click '**Save and return at a later date**'

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

Account Summary
Bob Brown | Logout

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	<u>Third Party Contributions, Contacts and Representatives</u>	Site and Project Details	Confirm and Submit
			Save and return at a later date

Applicant Representative Confirmation

Your Applicant Representative has successfully been assigned to complete this Application Form on your behalf. Once your Application Representative has completed the Application Form, you will be able to re-access the Application on the 'Account Details' page. You will then be able to view and confirm the information provided by your Applicant Representative, and submit the Application Form for approval to your local electric utility.

Please click 'Save and return at a later date' located at the top of the screen.

OR

If you wish to provide information about your Retrofit project, please click 'Next' to proceed further with your Application.

Previous Next



- H. When the Applicant Representative logs into their User Account, they will be able to 'Edit' the **RETROFIT PROGRAM** Application assigned to them via their User Account landing page.

ONTARIO POWER AUTHORITY

Home | About Us | Resources | Contacts

Logged in as the Applicant Representative

Account Summary
John Smith | Logout

FOR HOME | FOR BUSINESS | FIND PROGRAMS IN MY AREA

Welcome Back John Smith

Account Details

John Smith
7 Road Walk
Toronto, Ontario M4L2J1
Canada

[EDIT ACCOUNT DETAILS >>](#)

[CLOSE ACCOUNT >>](#)

Programs available to you

RETROFIT PROGRAM	SMALL BUSINESS
LEARN MORE >>	LIGHTING
GET STARTED >>	LEARN MORE >>
	GET STARTED >>

Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
	Pre-Project Application - Saved as Draft	17/05/2011 1:51:55 PM	Edit

Application started by Applicant

H

- I. Please see Section 9 for detailed instructions to complete the balance of the application.



9.1.2 Option 2: Applicant Representative Identifies Applicant

The Applicant Representative can initiate the **RETROFIT PROGRAM** Application Process and identify the Applicant who they wish to complete the application on behalf of, by following the steps detailed below.

- A. Within the ‘**Authorization**’ section of the **RETROFIT PROGRAM** Application process, select the answers to the questions as shown in the screen shot below and click ‘**Next**’ to proceed.

ONTARIO POWER AUTHORITY Home About Us Resources Contacts

Logged in as John Smith who will assume the role of an Applicant Representative for this application.

Account Summary
John Smith Logout

PROGRAMS CASE STUDIES SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit
---------------	---	--------------------------	--------------------

All worksheets, appendices and supporting documentation for your Project(s) must be uploaded. Incomplete Applications will not be processed and will not be approved by your local electric utility. The Applicant must signify its acceptance of the Terms and Conditions of this Application (the "Application") and the accompanying Participant Agreement (together, the "Agreement") before submitting to your local electricity distribution company (the "LDC").

PRIOR TO commencing your Project(s)
- Ensure that the LDC has accepted this Application and your Participant Agreement

AFTER completing your project
- You must submit evidence of Project completion in order to receive your Participant Incentive

To the Applicant: ALL REQUIRED fields which are marked with an asterisk (*) must be completed in order for the Application to be accepted for review by the LDC. See the Participant Agreement for defined terms. For Head Office Applications, you will have the opportunity to add additional building sites once you complete the entire Application.

The following questions will help identify you as either the Applicant or the Applicant Representative. Both the Applicant and Applicant Representative must have registered for a user account before they can be designated within the following pages of 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.**

*Are you the building owner or lessee or have contractual authority to bind the owner or lessee? If so, you will be considered the Applicant in this Application.
☐ Yes ☒ No

*Have you been designated as the Applicant Representative by the Applicant for the purposes of assisting in the completion of the Application? If so, you will be considered the Applicant Representative in this Application.
☒ Yes ☐ No

To learn more about whether your Retrofit project is eligible, please click [here](#) for more information.

Please click [here](#) to view the Terms and Conditions for this Program. You will be required to accept the Terms and Conditions prior to submitting your Application Form.

Next



The Applicant Representative must complete the '**Third Party Contributions**' section of the application if applicable. Please see Section 9 of this training manual for guidance on completing this section.

- B. Enter the email address of the Applicant who the Applicant Representative will be completing the **RETROFIT PROGRAM** Application Process on behalf of and click '**Search**'.

PROGRAMS CASE STUDIES SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization **Third Party Contributions, Contacts and Representatives** Site and Project Details Confirm and Submit [Save and return at a later date](#)

Third Party Contributions

* Have you received any other financial incentive(s) for this project through your local electric utility or any other public program?
☐ Yes ☒ No

Applicant Identification

Please enter the email address of the Applicant. The Applicant must have registered for a user account before they can be designated in this application. Once the application is completed, the Applicant will be notified by email. The Applicant will be asked to login to their user account to approve and submit the application to their local electric utility.

* Email Address

[Search](#) **B**

- C. The webpage will display the name and company associated with the specified email account as shown in the screen shot below.

PROGRAMS CASE STUDIES SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization **Third Party Contributions, Contacts and Representatives** Site and Project Details Confirm and Submit [Save and return at a later date](#)

Third Party Contributions

* Have you received any other financial incentive(s) for this project through your local electric utility or any other public program?
☐ Yes ☒ No

Applicant Identification

Please enter the email address of the Applicant. The Applicant must have registered for a user account before they can be designated in this application. Once the application is completed, the Applicant will be notified by email. The Applicant will be asked to login to their user account to approve and submit the application to their local electric utility.

* Email Address

[Search](#)

Is this the participant you were searching for?

Bob Brown
Bob's Business

[Yes](#) [No](#)

C

D



- D. If the webpage displays the correct information for the Applicant, select 'Yes' to proceed with the application process. The webpage will then display the contact information associated with the email address entered for the Applicant as shown in the screen shot below.

PROGRAMS CASE STUDIES SECTORS ▾

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit	Save and return at a later date
---------------	--	--------------------------	--------------------	---------------------------------

Third Party Contributions

* Have you received any other financial incentive(s) for this project through your local electric utility or any other public program?

☐ Yes ☒ No

Applicant's Company Details

* Company Name (Full Legal Name)

Bob's Business

Company Website

www.bobbusiness.com

Applicant Contact Details

Title (Mr. Miss Mrs.)

Mr

* First Name

Bob

* Last Name

Brown

* Phone Number

4169999999

Alternate Phone

6471112222

Fax

Applicant Identification

Please enter the email address of the Applicant. The Applicant must have registered for a user account before they can be designated in this application. Once the application is completed, the Applicant will be notified by email. The Applicant will be asked to login to their user account to approve and submit the application to their local electric utility.

* Email Address

bobbrownsbusiness@gmail.com

Pressing the 'Clear' button will allow you to re-enter a different email address and Applicant information. Once you enter this information and hit 'Next' below you will not be able to change the Applicant for this application.

Clear

TIP: Click 'Clear' to search for a new applicant.



Address

* Address Line 1

6 Bloor

Address Line 2 (optional)

Address Line 3 (optional)

☐ Lives Outside of Canada

* Street Type

Street

Street Direction

Select ...

* City

Toronto

* Province

Ontario

* Postal Code

M1J3H9

Next



It is important to confirm that the correct Applicant is identified within this section of the application because once the user clicks '**Next**' to proceed in the application process; *you cannot change the Applicant assigned to this application.*

- E. The webpage will display the Applicant Representative's company details which is editable at this point in the application process. To edit any of these fields, return to your main user account landing page.

PROGRAMS CASE STUDIES SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit	Save and return at a later date
---------------	---	--------------------------	--------------------	---------------------------------

Applicant Representative Identification

* Email Address

ABCconsultingfirm@gmail.com



Applicant Representative

Title (Mr. Miss Mrs.)

Mr

* First Name

John

* Last Name

Smith

Contact Details

* Phone Number

4169991234

Alternate Phone Number

Fax

Address

* Address Line 1

7 Road

Address Line 2 (optional)

Address Line 3 (optional)

☐ Lives Outside of Canada

* Street Type

Walk

Street Direction

Select ...

* City

Toronto

* Province

Ontario

* Postal Code

M4L2J1

* Company Name

ABC Consulting Firm

Previous

Next

- F. Please see Section 9 of this training manual for detailed instructions on how to complete the balance of the application process. Once the Applicant Representative has completed the application, a system-generated email will be sent to the Applicant notifying them of the completed application, which must be reviewed prior to submitting to their local electric utility.



10 Step 2: Third Party Contributions

To complete the **'Third Party Contributions'** section of the application, you must select the **'Yes'** radio button, which will trigger the web page to expand and provide the opportunity to complete this section as shown in the screen shot below.

PROGRAMS CASE STUDIES SECTORS ▾

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	Site and Project Details	Confirm and Submit	Save and return at a later date
---------------	--	--------------------------	--------------------	---------------------------------

Third Party Contributions

* Have you received any other financial incentive(s) for this project through your local electric utility or any other public program?

☒ Yes ☐ No

Details of Other Funding Sources

* Funding Provider(s). (If more than one funding provider, please separate with a comma.)

Ministry of Energy

* Name of Program(s). (If more than one program name, please separate with a comma.)

OSTH Program

* Total Funding Amount Expected and Received from all other Sources

5000

Funding Comments

funding approval in progress |

TIP: The system will automatically default the answer to this question as **'No'**. To view the details as shown below, you must select **'Yes'**.



11 Step 3: Site and Project Details

This section is broken up into two main components, which represent the **'Site and Project'** tab of the **RETROFIT PROGRAM** application process;

1. Site Details
2. Project Details

Note: The process to complete the **'Site and Project Details'** sections can be completed by either the Applicant or, if applicable, the Applicant Representative.



11.1 Site Details

Information about the building is requested to gather data about overall savings and condition of the building stock.

- A. To complete the Site Details section of the **RETROFIT PROGRAM** Application, all fields marked with an asterisk (*) are mandatory and must be completed prior to clicking '**Next**' to proceed with the application process.

The screenshot shows the 'saveONenergy RETROFIT PROGRAM Application' interface. The top navigation bar includes the Ontario Power Authority logo, links for Home, About Us, Resources, and Contacts, and a search bar. A user profile for John Smith is logged in. The main content area is titled 'For Business > Programs > RETROFIT PROGRAM'. Below this, the application steps are: Authorization, Third Party Contributions, Contacts and Representatives, Site and Project Details (active), Confirm and Submit, and a 'Save and return at a later date' button. The 'Building where Eligible Measures will be installed' section contains the following fields:

- Building Name: Building #1
- * Address Line 1: 120 Brock
- Address Line 2 (optional): Suite 1300
- Address Line 3 (optional):
- * Street Type: Ridge
- Street Direction: E
- * City: Toronto
- * Province: Ontario
- * Postal Code: M4L 3J3
- * HST Registrant #: 12345 1234

A callout box points to the Postal Code field with the text: 'Based on the postal code entered in this field, the system will assign the application to the servicing local electric utility.'

Below the fields, there is a note: 'If you receive an electric utility bill, please provide your Hydro Account #. Please contact your local electric utility if you need further assistance.' followed by the field: 001 234 567 890 1234 5.

* Check one
☒ Owner ☐ Tenant/Leaseholder



Building/Property Details

* Please select the building/property type(s)

- | | |
|---|--|
| <input type="checkbox"/> Agribusiness - Cattle Farm | <input type="checkbox"/> Industrial |
| <input type="checkbox"/> Agribusiness - Dairy Farm | <input type="checkbox"/> Mixed-Use - Office/Retail |
| <input type="checkbox"/> Agribusiness - Greenhouse | <input type="checkbox"/> Mixed-Use - Other |
| <input type="checkbox"/> Agribusiness - Other | <input type="checkbox"/> Mixed-Use - Residential/Retail |
| <input type="checkbox"/> Agribusiness - Poultry | <input type="checkbox"/> Multi-Residential - Condominium |
| <input type="checkbox"/> Agribusiness - Swine | <input type="checkbox"/> Multi-Residential - Rental Apartment |
| <input type="checkbox"/> Education - College / Trade School | <input type="checkbox"/> Multi-Residential - Social Housing Provider |
| <input type="checkbox"/> Education - Primary School | <input type="checkbox"/> Not-for-Profit |
| <input type="checkbox"/> Education - Secondary School | <input checked="" type="checkbox"/> Office |
| <input type="checkbox"/> Education - University | <input type="checkbox"/> Other: Please specify |
| <input type="checkbox"/> Hospital/Healthcare - Clinic | <input type="checkbox"/> Restaurant - Dining |
| <input type="checkbox"/> Hospital/Healthcare - Long-term Care | <input type="checkbox"/> Restaurant - Quick Serve |
| <input type="checkbox"/> Hospital/Healthcare - Medical Building | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Hospitality - Hotel | <input type="checkbox"/> Warehouse |
| <input type="checkbox"/> Hospitality - Motel | |

* Approximate year the building was built

1960

* Approximate total facility area (sq. ft.) of retrofitted area

60000

* Total Number of Floors

10

* Type of Existing Cooling System (e.g. unitary AC, chiller)

chiller

* Type of Existing Heating System (e.g. boiler, furnace)

boiler

Estimated Project Timelines

* Estimated Project Start Date:

18/05/2011

* Estimated Project Completion Date:

30/06/2011

Other Comments (for example, special site requirements or conditions which Project Evaluators should be aware of)

Safety boots required for site visit

Previous

Next

A



- B. Once you click '**Next**' as indicated in the screen shot above, the system will determine which local electric utility services the facility based on the postal code entered in this section of the application. If the system finds only one local electric utility that services the applicant's facility/building, the system will map the application to the appropriate local electric utility. If the system finds more than one local electric utility mapped to the postal code provided, the webpage will present a screen prompting the user to select the correct utility as shown in the screen shot below.

* Please upload your Tenant Education Plan (PDF or Word document). If you do not have a plan, please click [here](#) for education options, please click [here](#).

* Approximate year the building was built: 1960

* Approximate total facility area (sq. ft.): 60000

* Total Number of Floors: 10

* Type of Existing Cooling System (e.g. unit, chiller, boiler, etc.): chiller

* Type of Existing Heating System (e.g. boiler, furnace, etc.): boiler

Estimated Project Timelines

* Estimated Project Start Date: 18/05/2011

* Estimated Project Completion Date: 19/05/2011

Other Comments (for example, special site requirements): Safety boots required for site visit

Previous Next

Our records indicate that the postal code for the building/property entered matches more than one local electric utility service area. Please select your local electric utility from the list below. If you are unsure of who your local electric utility is, please refer to your electricity bill.

- ☐ Algoma Power Inc.
- ☐ Atikokan Hydro Inc.
- ☐ Attawapiskat Power Corporation
- ☐ Bluewater Power Distribution Corporation
- ☐ Brant County Power Inc.
- ☐ Brantford Power Inc.
- ☐ Burlington Hydro Inc.
- ☐ Cambridge and North Dumfries Hydro Inc.
- ☐ Canadian Niagara Power Inc.
- ☐ Centre Wellington Hydro Ltd.
- ☐ Chappleau Public Utilities Corporation
- ☐ Chatham-Kent Hydro Inc.
- ☐ Clinton Power Corporation
- ☐ COLLUS Power Corporation
- ☐ Cooperative Hydro Embrun Inc.
- ☐ E.L.K. Energy Inc.
- ☐ Enersource Hydro Mississauga Inc.
- ☐ EnWin Utilities Ltd.
- ☐ Erie Thames Powerlines Corporation



11.2 Tenant Education Incentive

If the building to be retrofitted is a multi-family building, an Applicant can elect to receive an additional incentive available for tenant education. The process to apply for this incentive is detailed in this section.

- A. To apply for the Tenant Education Incentive, you must select at least one of the following **'Building/Property types'** within the **'Site Details'** section of the **RETROFIT PROGRAM** application;

- Multi-Residential – Condominium
- Multi-Residential – Rental Apartment
- Multi-Residential - Social Housing Provider

Building/Property Details

* Please select the building/property type(s)

- | | |
|---|--|
| <input type="checkbox"/> Agribusiness - Cattle Farm | <input type="checkbox"/> Industrial |
| <input type="checkbox"/> Agribusiness - Dairy Farm | <input type="checkbox"/> Mixed-Use - Office/Retail |
| <input type="checkbox"/> Agribusiness - Greenhouse | <input type="checkbox"/> Mixed-Use - Other |
| <input type="checkbox"/> Agribusiness - Other | <input type="checkbox"/> Mixed-Use - Residential/Retail |
| <input type="checkbox"/> Agribusiness - Poultry | <input checked="" type="checkbox"/> Multi-Residential - Condominium |
| <input type="checkbox"/> Agribusiness - Swine | <input type="checkbox"/> Multi-Residential - Rental Apartment |
| <input type="checkbox"/> Education - College / Trade School | <input type="checkbox"/> Multi-Residential - Social Housing Provider |
| <input type="checkbox"/> Education - Primary School | <input type="checkbox"/> Not-for-Profit |
| <input type="checkbox"/> Education - Secondary School | <input type="checkbox"/> Office |
| <input type="checkbox"/> Education - University | <input type="checkbox"/> Other: Please specify |
| <input type="checkbox"/> Hospital/Healthcare - Clinic | <input type="checkbox"/> Restaurant - Dining |
| <input type="checkbox"/> Hospital/Healthcare - Long-term Care | <input type="checkbox"/> Restaurant - Quick Serve |
| <input type="checkbox"/> Hospital/Healthcare - Medical Building | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Hospitality - Hotel | <input type="checkbox"/> Warehouse |
| <input type="checkbox"/> Hospitality - Motel | |

A

TIP: To find out how the Tenant Education Incentive is calculated, click here.

Tenant Education Incentive

If you are a [Multi-Family Housing Provider](#) and would like to apply for the [Tenant Education Incentive](#), please click here: ☐

* Approximate year the building was built

1960

* Approximate total facility area (sq. ft.) of retrofitted area

60000

TIP: To find out if your building is eligible to receive the Tenant Education Incentive, click here.



- B. To apply for the Tenant Education Incentive, click the check box as shown in the screen shot below.

Building/Property Details

* Please select the building/property type(s)

<input type="checkbox"/> Agribusiness - Cattle Farm	<input type="checkbox"/> Industrial
<input type="checkbox"/> Agribusiness - Dairy Farm	<input type="checkbox"/> Mixed-Use - Office/Retail
<input type="checkbox"/> Agribusiness - Greenhouse	<input type="checkbox"/> Mixed-Use - Other
<input type="checkbox"/> Agribusiness - Other	<input type="checkbox"/> Mixed-Use - Residential/Retail
<input type="checkbox"/> Agribusiness - Poultry	<input checked="" type="checkbox"/> Multi-Residential - Condominium
<input type="checkbox"/> Agribusiness - Swine	<input type="checkbox"/> Multi-Residential - Rental Apartment
<input type="checkbox"/> Education - College / Trade School	<input type="checkbox"/> Multi-Residential - Social Housing Provider
<input type="checkbox"/> Education - Primary School	<input type="checkbox"/> Not-for-Profit
<input type="checkbox"/> Education - Secondary School	<input type="checkbox"/> Office
<input type="checkbox"/> Education - University	<input type="checkbox"/> Other: Please specify
<input type="checkbox"/> Hospital/Healthcare - Clinic	<input type="checkbox"/> Restaurant - Dining
<input type="checkbox"/> Hospital/Healthcare - Long-term Care	<input type="checkbox"/> Restaurant - Quick Serve
<input type="checkbox"/> Hospital/Healthcare - Medical Building	<input type="checkbox"/> Retail
<input type="checkbox"/> Hospitality - Hotel	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Hospitality - Motel	

Tenant Education Incentive

If you are a [Multi-Family Housing Provider](#) and would like to apply for the [Tenant Education Incentive](#), please click here: ☒ **B**

* Please upload your Tenant Education Proposal below. For more information about the available tenant education options, please click [here](#).

Tenant Education Proposal - sample.pdf ☒ Remove

C

* Approximate year the building was built

* Approximate total facility area (sq. ft.) of retrofitted area

- C. Once the check box has been checked, the webpage will expand and provide an opportunity to upload and attach a Tenant Education Proposal to the **RETROFIT PROGRAM** application. Click 'Select' to locate and upload your Tenant Education Proposal.
- D. Following completion of the **RETROFIT PROGRAM** application, the system will calculate and display the eligible Tenant Education Incentive amount on the 'View' page.



11.3 Social Housing Adder

Within the **RETROFIT PROGRAM** online application process, an Applicant who is an eligible Social Housing Provider can elect to receive an additional incentive known contractually as the 'Social Housing Adder'. Additionally, the Applicant can also elect to receive the Participant Advance Payment. The process to elect to receive both of these options is detailed in this section.

- A. To apply for the Social Housing Adder and Participant Advance Payment, you must select '**Multi-Residential - Social Housing Provider**' from the choices in the '**Building/Property Details**' question within the '**Site and Project Details**' section of the **RETROFIT PROGRAM** application.

This building type selection will trigger the web page to expand and provide an opportunity to apply to receive the Social Housing Adder and the Participant Advance payment as shown in the screen shot below.

Building/Property Details

* Please select the building/property type(s)

- | | |
|---|---|
| <input type="checkbox"/> Agribusiness - Cattle Farm | <input type="checkbox"/> Industrial |
| <input type="checkbox"/> Agribusiness - Dairy Farm | <input type="checkbox"/> Mixed-Use - Office/Retail |
| <input type="checkbox"/> Agribusiness - Greenhouse | <input type="checkbox"/> Mixed-Use - Other |
| <input type="checkbox"/> Agribusiness - Other | <input type="checkbox"/> Mixed-Use - Residential/Retail |
| <input type="checkbox"/> Agribusiness - Poultry | <input type="checkbox"/> Multi-Residential - Condominium |
| <input type="checkbox"/> Agribusiness - Swine | <input type="checkbox"/> Multi-Residential - Rental Apartment |
| <input type="checkbox"/> Education - College / Trade School | <input checked="" type="checkbox"/> Multi-Residential - Social Housing Provider |
| <input type="checkbox"/> Education - Primary School | <input type="checkbox"/> Not-for-Profit |
| <input type="checkbox"/> Education - Secondary School | <input type="checkbox"/> Office |
| <input type="checkbox"/> Education - University | <input type="checkbox"/> Other: Please specify |
| <input type="checkbox"/> Hospital/Healthcare - Clinic | <input type="checkbox"/> Restaurant - Dining |
| <input type="checkbox"/> Hospital/Healthcare - Long-term Care | <input type="checkbox"/> Restaurant - Quick Serve |
| <input type="checkbox"/> Hospital/Healthcare - Medical Building | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Hospitality - Hotel | <input type="checkbox"/> Warehouse |
| <input type="checkbox"/> Hospitality - Motel | |

A

TIP: To find out how the Social Housing Adder is calculated, click here.

TIP: To find out how the Participant Advance Payment is calculated, click here.

Social Housing Adder

If you are a [Social Housing Provider](#) and would like to apply for the [Social Housing Adder](#) and [Participant Advance Payment](#), please click here: ☐

Tenant Education Incentive

If you are a [Multi-Family Housing Provider](#) and would like to apply for the [Tenant Education Incentive](#), please click here: ☐

* Approximate year the building was built

1960

* Approximate total facility area (sq. ft.) of retrofitted area

60000

TIP: To find out if an applicant is eligible to receive the Social Housing Adder and Participant Advance Payment, click here.



- B. To apply for the Social Housing Adder and Participant Advance Payment, click the check box as shown in the screen shot below.

Building/Property Details

* Please select the building/property type(s)

<input type="checkbox"/> Agribusiness - Cattle Farm	<input type="checkbox"/> Industrial
<input type="checkbox"/> Agribusiness - Dairy Farm	<input type="checkbox"/> Mixed-Use - Office/Retail
<input type="checkbox"/> Agribusiness - Greenhouse	<input type="checkbox"/> Mixed-Use - Other
<input type="checkbox"/> Agribusiness - Other	<input type="checkbox"/> Mixed-Use - Residential/Retail
<input type="checkbox"/> Agribusiness - Poultry	<input type="checkbox"/> Multi-Residential - Condominium
<input type="checkbox"/> Agribusiness - Swine	<input type="checkbox"/> Multi-Residential - Rental Apartment
<input type="checkbox"/> Education - College / Trade School	<input checked="" type="checkbox"/> Multi-Residential - Social Housing Provider
<input type="checkbox"/> Education - Primary School	<input type="checkbox"/> Not-for-Profit
<input type="checkbox"/> Education - Secondary School	<input type="checkbox"/> Office
<input type="checkbox"/> Education - University	<input type="checkbox"/> Other: Please specify
<input type="checkbox"/> Hospital/Healthcare - Clinic	<input type="checkbox"/> Restaurant - Dining
<input type="checkbox"/> Hospital/Healthcare - Long-term Care	<input type="checkbox"/> Restaurant - Quick Serve
<input type="checkbox"/> Hospital/Healthcare - Medical Building	<input type="checkbox"/> Retail
<input type="checkbox"/> Hospitality - Hotel	<input type="checkbox"/> Warehouse
<input type="checkbox"/> Hospitality - Motel	

Social Housing Adder

If you are a [Social Housing Provider](#) and would like to apply for the [Social Housing Adder](#) and [Participant Advance Payment](#), please click here: ☒

Tenant Education Incentive

If you are a [Multi-Family Housing Provider](#) and would like to apply for the [Tenant Education Incentive](#), please click here: ☐

* Approximate year the building was built

1960

* Approximate total facility area (sq. ft.) of retrofitted area

60000

B

TIP: If you select the "Multi-Residential – Social Housing Provider" building type, you may also apply for the Tenant Education Incentive as well.

- C. Once the application has been completed, the system will calculate the eligible Participant Advance Payment and display on the 'View' page.



11.4 Project Details

To complete the following page, first select the description from the drop-down menu that best describes the project. The options include:

1. Planned replacement
2. Unexpected replacement
3. New equipment for process or expansion operation
4. Equipment Efficiency upgrade

The second question will determine which types of measures are included in the **RETROFIT PROGRAM** application which can include prescriptive measures, engineered measures and/or custom measures.

As shown in the screen shot below, the next sections explain each approach beginning with the Prescriptive Approach.



11.5 Prescriptive Approach

In order to complete the Prescriptive Approach portion of the **RETROFIT PROGRAM** Application, the Applicant or AR must complete the following steps:

- A. Enter the total estimated equipment costs for ALL prescriptive measures in the **'Prescriptive Approach Project Cost'** section.
- B. Select from the **'Prescriptive Worksheet Type'** drop down list the Prescriptive Worksheet which is applicable to this application. Based on this selection, the system will filter only those measures from the selected Prescriptive Worksheet and display in the second drop-down list.
- C. Select from the **'Prescriptive Measure'** drop-down list the prescriptive measure to be installed.
- D. Enter the number of units to be installed in the **'Quantity'** field. Below you will find instructions on how to enter the quantity for certain prescriptive measures:

Occupancy Sensors:

Given that proration of incentive rates for occupancy sensors is permitted for controlled loads of less than 300W per sensor, the quantity used to calculate the Incentive amount will include decimal places. Given that decimal places are not accepted in the online application form, a whole number must be entered. To do this, calculate the quantity then round the number up. For example, in the case of an occupancy sensor which has a controlled load of 200W, this measure would have a calculated quantity of 0.67 (200W/300W). 0.67 rounded up to the nearest whole number equals 1. As such, a quantity of "1" must be entered into the online application form. **IMPORTANT NOTE:** The above steps are **only** to be used for submitting the online application. Supporting documents, specifically, the Lighting Prescriptive worksheet **must** indicate the calculated quantities as such, using the previous example, you would need to be complete the Lighting Prescriptive Worksheet using a quantity of 0.67.

Unitary AC:

The Incentive amount for eligible unitary AC units is calculated by multiplying the number of units to be installed by the size of each unit (in tons) which is then multiplied by the participant incentive rate (\$/ton). If your project contains a prescriptive unitary AC unit, you will be required to multiply the number of AC units by the size of each unit (in tons) and enter this result into the **'Quantity'** field within the Prescriptive Approach. If this value contains a decimal place, round up the calculated quantity to the nearest whole number and enter this value into the **'Quantity'** field within the Prescriptive Approach section. As is the case with Occupancy Sensors as noted above, the Unitary AC Prescriptive Worksheet must be completed with the calculated quantity (including decimal places) and uploaded as supporting documentation to the RETROFIT Application.



Solar Hot Water Collectors:

The Incentive amount for eligible solar hot water collectors is calculated by multiplying the total collector area (in m²) by the associated performance factor of the unit which is then multiplied by the unit Participant Incentive amount. If your project contains a solar hot water collector, you will be required to multiply the total collector area (in m²) by the associated performance factor and enter this result into the '**Quantity**' field within the Prescriptive Approach section. If the product (total collector area x associated performance factor) contains decimal places, round this value to the nearest whole number and enter it into the '**Quantity**' field within the Prescriptive Approach. As is case with the measures noted above, the Alternative Energy Measures for Service Hot Water Prescriptive Worksheet must be completed with the product (including decimal places) and uploaded as supporting documentation to the RETROFIT Application.

- E. Click '**Save & Add**' to add the prescriptive measure to your application.



saveONenergy RETROFIT PROGRAM Application

Authorization

Third Party
Contributions,
Contacts and
Representatives

Site and Project Details

Confirm and Submit

Save and return at a later date

Prescriptive Approach Details

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

TIP: Click here to view a list of ineligible project costs for prescriptive measures.

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

A

* Estimated costs of the equipment

4200

Prescriptive Measures

Please select the Prescriptive Worksheet, the Measure and then enter the Quantity of Measures. Click the 'Add' button to add the measure to your project. You will then be able to add additional measures to your project. There is no limit to the number of measures you can add.

B

* Please select the applicable Prescriptive Worksheet Type from the drop-down list below

Lighting

C

* Please select the Prescriptive Measure from the drop-down list below.
This list has been filtered based on the Prescriptive Worksheet Type selected above.

New Exit Signs - 5 Watt or less

D

* Quantity

20

E

Save & Add

No measures added

Prescriptive Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$0.00

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Completed Prescriptive Worksheets & Estimated Project cost details

Select

Manufacturer technical specification sheets

Select

Previous

Next



- F. Once the **'Save & Add'** button is clicked, the system will perform the following:
- Display the measure name, per unit incentive amount and calculate the eligible participant incentive amount
 - Update the **'Prescriptive Approach Estimated Incentive'** which represents the total participant incentive amount for all prescriptive measures.

ONTARIO POWER AUTHORITY Home About Us Resources Contacts

Account Summary
John Smith Logout

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit [Save and return at a later date](#)

Prescriptive Approach Details

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Estimated costs of the equipment
4200

Prescriptive Measures

Please select the Prescriptive Worksheet, the Measure and then enter the Quantity of Measures. Click the 'Add' button to add the measure to your project. You will then be able to add additional measures to your project. There is no limit to the number of measures you can add.

* Please select the applicable Prescriptive Worksheet Type from the drop-down list below
Select ...

* Please select the Prescriptive Measure from the drop-down list below. This list has been filtered based on the Prescriptive Worksheet Type selected above.
Select ...

* Quantity
[Input field]

[Save & Add](#)

New Exit Signs - 5 Watt or less@\$15.00 * [Remove](#)
20 = \$300.00

Prescriptive Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$300.00**

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Completed Prescriptive Worksheets & Estimated Project cost details
[Select]

Manufacturer technical specification sheets
[Select]

[Previous](#) [Next](#)



- G. Repeat steps (A) to (F) to add additional prescriptive measures to the project.
- H. Upload the following supporting documentation under the '**Supporting Documentation**' section:
- Completed prescriptive worksheet(s) detailing additional measure information such as the Manufacturer and Model number.
 - Estimates, quotes or proposals to support the estimated project cost.
 - Manufacturers' technical specification sheets demonstrating that the equipment meet the program requirements.

TIP: To determine if the document was successfully uploaded, the system will display a green dot beside the file name. If you see a red dot, this indicates an unsuccessful file upload. For a list of document types which **cannot** be uploaded, please refer to **Appendix A** of this training manual.

TIP: Download the applicable prescriptive worksheet here and complete with additional information such as manufacturer and model numbers then upload in the '**Supporting Documentation**' section.

TIP: To remove a measure, click **Remove**

H (i)

H (ii)

H (iii)

J



- I. Review the information provided in the Prescriptive Approach portion of the **RETROFIT PROGRAM** Application
- J. Click '**Next**' to proceed in the **RETROFIT** Application process.



11.6 Engineered Approach

In order to complete the Engineered Approach portion of the **RETROFIT PROGRAM** Application, the Applicant or Applicant Representative must complete the following steps:

- A. Enter the total estimated eligible project costs in the '**Engineered Approach Project Cost**' section for ALL engineered measures. NOTE: For engineered measures, there are only 4 eligible project costs as indicated in the screen shot below.
- B. Click the '**Update**' button which will sum the 4 eligible project costs for the engineered measures and display in the '**Engineered Approach Project Cost**' field.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS ▾

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization	Third Party Contributions, Contacts and Representatives	<u>Site and Project Details</u>	Confirm and Submit	Save and return at a later date
---------------	---	---------------------------------	--------------------	---------------------------------

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

- [Sample Engineering Tool](#)

Engineered Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

Estimated costs of labour for the installation of the equipment by suppliers

Estimated costs to dispose of or decommission the replaced equipment

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations

Engineered Approach Project Cost **\$0.00**

A

B

TIP: Click here to view a list of ineligible project costs for engineered measures.



- C. Upload the following supporting documentation under the ‘**Supporting Documentation**’ section:
- Estimates, quotes, or proposals to support the estimated project cost
 - Manufacturers’ technical specification sheets demonstrating that the equipment meets the program requirements.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit [Save and return at a later date](#)

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

[Sample Engineering Tool](#)

Engineered Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

Estimated costs of labour for the installation of the equipment by suppliers

Estimated costs to dispose of or decommission the replaced equipment

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations

Engineered Approach Project Cost **\$27,134.00** [Update](#)

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Equipment cost estimates, quotes, proposals or invoices

[Quote_4.GIF](#) [xRemove](#)

[Quote_3.GIF](#) [xRemove](#)

[Select](#)

Manufacturer technical specification sheets

[VFD Technical Sheet.pdf](#) [xRemove](#)

[Commercial High Bay Spec sheet.pdf](#) [xRemove](#)

[Select](#)

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

Clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

[Add Engineered Measure](#)

Engineered Approach Estimated Incentive (incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$0.00**

[Previous](#) [Next](#)

C (i)

C (ii)

TIP: To determine how the term Demand Savings is defined, click [here](#).

TIP: To determine how the term Energy Savings is defined, click [here](#).

D



- D. To add an engineered measure to your project, click '**Add Engineered Measure**' as indicated in the screen shot above which will trigger the web page to expand as shown in the screen shot below.
- E. Select the '**Engineered Worksheet**' type from the drop-down menu. Based on this selection, the system will apply the appropriate incentive structure as follows:
- *Lighting Incentive Structure*: \$400/kW of Demand Savings or \$0.05/kWh of Energy Savings
 - *Non-Lighting Incentive Structure*: \$800/kW of Demand Savings or \$0.10/kWh of Energy Savings
- F. Upload the completed engineered worksheet by clicking the '**Select**' button to search for the document to attach to your application.
- G. Enter the Demand Savings (kW) as per the output of the Engineered Worksheet.
- H. Enter the Energy Savings (kWh) as per the output of the Engineered Worksheet.
- I. Click '**Save & Add**' which will add the engineered measure to the application.

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Equipment cost estimates, quotes, proposals or invoices

[Quote_4.GIF](#) [Remove](#)

[Quote_3.GIF](#) [Remove](#)

[Select](#)

Manufacturer technical specification sheets

[VFD Technical Sheet.pdf](#) [Remove](#)

[Commercial High Bay Spec sheet.pdf](#) [Remove](#)

[Select](#)

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate Demand Savings (kW) and Energy Savings (kWh), please complete the applicable Engineered Worksheet(s) available for download above.

Please select the Engineered Worksheet Type, upload the completed Engineered Worksheet, enter the Demand Savings (kW) and Energy Savings (kWh) then click 'Save & Add' for each measure.

* Please select the applicable Engineered Worksheet Type from the drop-down list below

VSD on Fan [Select](#) **E**

* Please upload the applicable Engineered Worksheet below

VSD-on-Fan-Worksheet- Bob Business.xls [Select](#) **F**

* Please enter the Demand Savings (kW) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

18.7 **G**

* Please enter the Energy Savings (kWh) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

163363 **H**

I



- J. Once the **'Save & Add'** button is clicked, the system will perform the following;
- Display the **'Worksheet Type'**, hyperlink to the uploaded engineered worksheet, **'Demand Savings'** and **'Energy Savings'** previously entered.
 - Based on the selected engineered worksheet type, the system will calculate the kW and kWh incentive and only display the higher amount in the **'Estimated Incentive'** field.
 - Update the **'Engineered Approach Estimated Incentive'** which represents the total participant incentive amount for all engineered measures.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit [Save and return at a later date](#)

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

[Sample Engineering Tool](#)

Engineered Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment
18194

Estimated costs of labour for the installation of the equipment by suppliers
8440

Estimated costs to dispose of or decommission the replaced equipment
500

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations
\$0.00

Engineered Approach Project Cost **\$27,134.00** [Update](#)

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Equipment cost estimates, quotes, proposals or invoices

[Quote_1.GIF](#) [Remove](#)

[Quote_3.GIF](#) [Remove](#)

[Select](#)

Manufacturer technical specification sheets

[VFD Technical Sheet.pdf](#) [Remove](#)

[Commercial High Bay Spec sheet.pdf](#) [Remove](#)

[Select](#)

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Estimated Incentive
VSD on Fan	VSD-on-Fan-Worksheet_Bob_Business.xls	18.7	163363	\$16,336.30 Edit Remove

[Add Engineered Measure](#)

Engineered Approach Estimated Incentive (incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$16,336.30**

[Previous](#) [Next](#)

TIP: Click on the engineered worksheet file name to view the document

J (ii)

J (i)

J (iii)



- K. Repeat steps (D) to (J) to add additional engineered measures to this application.
- L. Review the information provided in the Engineered Approach portion of the **RETROFIT PROGRAM** Application.
- M. Click '**Next**' to proceed with the **RETROFIT PROGRAM** Application process.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS ▾

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit [Save and return at a later date](#)

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

[Sample Engineering Tool](#)

Engineered Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment
10194

Estimated costs of labour for the installation of the equipment by suppliers
8440

Estimated costs to dispose of or decommission the replaced equipment
500

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations
\$0.00

Engineered Approach Project Cost **\$27,134.00** [Update](#)

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Equipment cost estimates, quotes, proposals or invoices

[Quote_4.GIF](#) [Remove](#)

[Quote_3.GIF](#) [Remove](#)

[Select](#)

Manufacturer technical specification sheets

[VFD Technical Sheet.pdf](#) [Remove](#)

[Commercial High Bay Spec sheet.pdf](#) [Remove](#)

[Select](#)

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Estimated Incentive		
VSD on Fan	VSD on Fan Worksheet - Bob Business.xls	18.7	163363	\$16,336.30	Edit	Remove
Commercial High Bay Lighting	RETROFIT Commercial High Bay Lighting Engineering Worksheet v1.0 - March 2011 (FSL).xls	9.4	28312	\$3,760.00	Edit	Remove

[Add Engineered Measure](#)

Engineered Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$20,096.30**

[Previous](#) [Next](#) **M**



In order to complete the Custom Approach portion of the **RETROFIT PROGRAM** Application, the Applicant or Applicant Representative must complete the following steps:

- ## saveONenergy RETROFIT PROGRAM Application

TIP: The base case and energy efficient case text boxes will accept a maximum of 1,000 characters. To provide a more detailed description of the base and energy efficiency cases, the applicant may upload this additional information in the supporting documentation section.



- D. Enter the total estimated eligible project costs in the '**Custom Approach Project Cost**' section for ALL custom measures. For custom measures, there are only 9 eligible project costs as indicated in the screen shot below.
- E. Click the '**Update**' button which will sum up the 9 eligible project costs for the custom measures and display in the '**Custom Approach Project Cost**' field.

Custom Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

835870

Estimated or actual costs of labour for the installation of the equipment by suppliers

292554 \$0

Estimated or actual costs to dispose of or decommission the replaced equipment

41793

Estimated or actual costs of energy audit assessments not funded by the OPA

\$0.00

Estimated or actual costs of design, engineering and/or architecture associated with the project

\$0.00

Estimated or actual project management costs provided by third parties

\$0.00

Estimated or actual costs to deliver the equipment

5000

Estimated or actual costs of inspection of the Project as may be required pursuant to Laws and Regulations

\$0.00

Estimated or actual costs to prepare and implement the Project M&V Plan or costs to assist the LDC in preparing supporting documentation

35000

Custom Approach Project Cost

\$ 0.00

Update

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Add Custom Measure

Custom Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project level)

\$0.00

Previous

Next

TIP: Click here to view a list of ineligible project costs for custom measures.



- F. To add a custom measure to your application, click '**Add Custom Measure**' as indicated in the screen shot above, which will trigger the webpage to expand as shown in the screen shot below.
- G. Enter a brief custom measure description
- H. Enter the '**Base Case electricity demand (kW)**' for the custom measures as per the uploaded supporting calculations
- I. Enter the '**Base Case annual electricity consumption (kWh)**' for the custom measures as per the uploaded supporting calculations
- J. Enter the '**Energy Efficient Case electricity demand (kW)**' for the custom measures as per the supporting calculations
- K. Enter the '**Energy Efficient Case annual electricity consumption (kWh)**' for the custom measures as per the supporting calculations
- L. Select the project type for the custom measure, the options being '**Lighting**' or '**Non-Lighting**'. Based on this selection, the system will apply the appropriate incentive structure as follows:
 - *Lighting Incentive Structure:* \$400/kW of Demand Savings or \$0.05/kWh of Energy Savings
 - *Non-Lighting Incentive Structure:* \$800/kW of Demand Savings or \$0.10/kWh of Energy Savings
- M. Select '**Save& Add**' to add the custom measure to the application



Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Please complete all fields below then click 'Save & Add' for each custom measure.

* Measure description

Chiller upgrade

* Base Case electricity demand (kW)

667

* Base Case annual electricity consumption (kWh)

2921460

* Energy Efficient Case electricity demand (kW)

302

* Energy Efficient Case annual electricity consumption (kWh)

1322760

* Please identify which type of project you are applying for

Non-Lighting

[Help](#)

Save & Add

Cancel

Custom Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project level)

\$0.00

Previous

Next



- N. Once the **'Save & Add'** button is clicked, the system will perform the following:
- Display the **'Measure Description'**, **'Base Case electricity demand (kW)'**, **'Base Case annual electricity consumption (kWh)'**, **'Energy Efficient Case annual electricity consumption (kWh)'**
 - Calculate and display the **'Demand Savings'** (kW)
 - Calculate and display the **'Energy Savings'** (kWh)
 - Based on the selected project type (Lighting or Non-Lighting), the system will calculate the kW and kWh incentive and only display the higher amount in the **'Calculated Participant Incentive'** field.
 - Update the **'Engineered Approach Estimated Incentive'** which represents the total participant incentive amount for all engineered measures.

Custom Approach Project Cost \$ 1,210,217.50 [Update](#)

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Measure description	Base Case electricity demand (kW)	Base Case annual electricity consumption (kWh)	Energy Efficient Case electricity demand (kW)	Energy Efficient Case annual electricity consumption (kWh)	Demand Savings	Energy Savings	Project type	Calculated Participant Incentive	
Chiller upgrade	667	2921460	302	1322760	365	1598700	Non-Lighting	\$292,000.00	Edit Remove

[Add Custom Measure](#)

N (i) **N (ii)** **N (iii)** **N (iv)**

Custom Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project level) **\$292,000.00**

Based on the Total Participant Incentive Amount Requested, a Project M&V Plan is required for the Custom Measures included in this Project. For additional information, refer to the [Project M&V Procedures](#). Please upload the proposed Project M&V Plan below:

N (v)

[Previous](#) [Next](#) **Q**

- O. Repeat steps (D) to (J) to add additional custom measures to the project
- P. Review the information provided in the Custom Approach portion of the **RETROFIT PROGRAM** Application
- Q. Click **'Next'** to proceed in the **RETROFIT PROGRAM** Application process



11.8 Custom Project M&V Plan

If a project contains custom measures with an estimated participant incentive amount greater or equal to \$10,000, the Applicant is required to submit a Project M&V Plan. Once the calculated participant incentive amount in the Custom Approach section is greater or equal to \$10,000, the webpage will expand and provide an opportunity to upload a Custom Project M&V proposal. Then, follow these steps:

- A. Click **'Select'** to locate and upload the Custom Project M&V Plan
- B. Click **'Next'** to proceed in the **RETROFIT PROGRAM** Application process

Custom Approach Project Cost

\$ 1,210,217.50

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Measure description	Base Case electricity demand (kW)	Base Case annual electricity consumption (kWh)	Energy Efficient Case electricity demand (kW)	Energy Efficient Case annual electricity consumption (kWh)	Demand Savings	Energy Savings	Project type	Calculated Participant Incentive	
Chiller upgrade	667	2921460	302	1322760	365	1598700	Non-Lighting	\$292,000.00	Edit Remove

Custom Approach Estimated Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project level)

\$292,000.00

Based on the Total Participant Incentive Amount Requested, a Project M&V Plan is required for the Custom Measures included in this Project. For additional information, refer to the [Project M&V Procedures](#). Please upload the proposed Project M&V Plan below:

A

Select

B

Previous

Next

C

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POWER AUTHORITY



NOTE: A Project M&V plan is only required when the Incentive amount from ONLY Custom Measures (subject to the 50% Eligible Project Cost cap) is greater than \$10,000. However, the system is configured differently such that it asks you to provide a Project M&V plan within the Custom Approach when the Calculated Incentive amount is greater than \$10,000 (i.e. the Incentive amount is not subject to the 50% Eligible Project Cost cap). Additionally, the system will cap the Calculated Incentive amount based on 50% of the Eligible Project Cost cap after the application has been submitted and displays this amount on the summary 'View' page accessible from the main landing page of your user account. Please see section 13.1 for more details.

As such, if the *Calculated* Incentive amount is for example \$35,000 and the Total Eligible Project Cost is \$18,000, the system would request that a Project M&V Plan be uploaded even though the Eligible Incentive amount calculates to \$9,000. Given the system will not allow you to proceed with the application process, in place of a Project M&V Plan, we ask that you upload a placeholder document in order to bypass this system requirement. An example of such placeholder could be a Microsoft word document stating the following:

"I have uploaded this placeholder to by-pass the Project M&V upload requirement given that my Eligible Incentive amount for custom measures is \$9,000. Please refer to uploaded invoices for supporting documentation"



11.9 Head Office Applications

Applicants who have more than one project located in multiple facilities serviced by different local electric utilities have the option of submitting a Head Office Application. This type of application allows the Applicant the ability to select one local electric utility as their lead point of contact in the application process. The lead local electric utility is responsible for coordinating the activities associated with your Application approval with the other local electric utilities, satellite companies, and issuing the final participant incentive payment. The process to submit a Head Office Application is as follows:

- A. Complete the application process for one building facility as outlined in the sections above.
- B. Before proceeding to the '**Confirm and Submit**' section of the **RETROFIT PROGRAM** application, click the '**Add another building**' button as indicated in the screen shot below.

- C. The system will redirect the Applicant or Applicant Representative to the beginning of the '**Site and Project Details**' section of the **RETROFIT PROGRAM** Application to add a second facility to the application. Please see Section 10 the training manual for detailed instructions.



- D. Once the project and site details have been added for the second building/facility, the system will provide a summary of the buildings/facilities added to the application as shown in the screen shot below.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit [Save and return at a later date](#)

Buildings listed on this application

Remove	Edit	Building #1 120 Brock Ridge E LDC - Atikokan Hydro Inc.	✓
Remove	Edit	Building #2 33 Hart Avenue LDC - Horizon Utilities Corporation	✓

Click the "Edit" link to make any final changes to your application before submitting for each building

[Add another building](#)

☐ Would you like to assign one local electricity distribution company (LDC) as your Lead LDC for this Head Office Project? [Help](#)

[Previous](#) [Next](#)

TIP: Click the 'Help' field to find information about the responsibilities of the lead local electric utility.

- E. Repeat steps (B) to (D) to add additional buildings/facilities to the application.



NOTE: If you have not selected a Lead LDC for your the Head Office Application and you have not yet submitted the Application to the local electric utility (i.e. the application has a status of 'Pre-Project Application - Saved as Draft'), the system will separate each facility into individual applications. If you wish to continue to enter the information under a Head Office Application, you will need to select a Lead LDC prior to clicking '**Save and return at a later date**' as shown in steps F and G below.



- F. Once the Site and Project Details have been added for each facility, check the box beside the question “**Would you like to assign one local electricity distribution company (LDC) as your Lead LDC for this Head Office project?**”
- G. Once the check box has been clicked, the system will expand to display a drop down list in which the Applicant or Applicant Representative must select the lead local electric utility which they would like to assign to the Head Office Project.

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives **Site and Project Details** Confirm and Submit Save and return at a later date

Buildings listed on this application

Remove Edit	Building #1 120 Brock Ridge E LDC - Atikokan Hydro Inc.	✓
Remove Edit	Building #2 33 Hart Avenue LDC - Horizon Utilities Corporation	✓

Click the "Edit" link to make any final changes to your application before submitting for each building

Add another building

☒ Would you like to assign one local electricity distribution company (LDC) as your Lead LDC for this Head Office Project? [Help](#)

The Participant elects the LDC listed below as the Lead LDC. If the LDC which you would like to assign as the Lead LDC appears more than once in the drop down list, please select the LDC once. The specific building address listed with the Lead LDC is not relevant to this selection.

Select

Select

Atikokan Hydro Inc. - 120 Brock
Horizon Utilities Corporation - 33 Hart

Previous Next

- H. Click ‘**Next**’ to proceed with the **Retrofit** Application process.



12 Step 4: Confirm and Submit

The **'Confirm and Submit'** section is the final stage before a **RETROFIT PROGRAM** Application can be submitted to the local electric utility for review and pre-approval. The process to complete this section is as detailed below:

- A. Verify that each section of the **RETROFIT PROGRAM** Application has been successfully completed. The system will display a warning sign (⚠) beside the section that is not completed and a check mark (✓) if all required fields within the **RETROFIT PROGRAM** Application have been completed.

- B. The Applicant must accept to the **RETROFIT PROGRAM** Participant Agreement prior to submitting to the local electric utility.
- C. Click **'Submit'** to proceed in the application process.



- D. The system will display a final confirmation message prior to submitting the **RETROFIT PROGRAM** Application as shown in the screen shot below. Select 'OK' to proceed.

Account Summary
Bob Brown Logout

PROGRAMS CASE STUDIES FIND PROGRAMS IN MY AREA SECTORS

For Business > Programs > RETROFIT PROGRAM

saveONenergy RETROFIT PROGRAM Application

Authorization Third Party Contributions, Contacts and Representatives Site and Project Details **Confirm and Submit** Save and return at a later date

Confirm and Submit

Message from webpage
Are you sure you want to submit this application?
OK Cancel

You have now completed all required information in the Application Form. Please ensure that the information entered is accurate before clicking Submit.

- ✓ Authorization
- ✓ Third Party contributions, Contacts and Representatives
- ✓ Site and Project Details

☒ I understand and agree to the terms and conditions as set forth in the [Retrofit Participant Agreement](#)

By clicking 'Submit', I certify that the information provided in this Application is true, accurate and complete.

Previous Submit

- E. The system will direct the Applicant back to their main user account landing page and update the **RETROFIT PROGRAM** Application Status as 'Pre-Project Application – Submitted to LDC'.

ONTARIO POWER AUTHORITY

Home About Us Resources Contacts

Account Summary
Bob Brown Logout

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Welcome Back Bob Brown

Account Details

Bob Brown
6 Bloor Street Suite 1800
Toronto, Ontario M1J3H9
Canada

[EDIT ACCOUNT DETAILS >>](#)
[CLOSE ACCOUNT >>](#)

Programs available to you

RETROFIT PROGRAM LEARN MORE >> GET STARTED >>	SMALL BUSINESS LIGHTING LEARN MORE >> GET STARTED >>
--	---

Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Submitted to LDC	20/05/2011 4:09:25 PM	View



12.1 Pre-Project Application 'View' page

Once the Applicant has completed the Pre-Project **RETROFIT PROGRAM** Application, they have the option of to view a summary of the application content. The process to view this information is as follows:

- A. On the main landing page of the User Account, click the '**View**' button for an Application.

ONTARIO POWER AUTHORITY Home About Us Resources Contacts

Account Summary
Bob Brown Logout

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Welcome Back Bob Brown

Account Details
Bob Brown
6 Bloor Street Suite 1800
Toronto, Ontario M1J3H9
Canada
[EDIT ACCOUNT DETAILS >>](#)
[CLOSE ACCOUNT >>](#)

Programs available to you

RETROFIT PROGRAM	SMALL BUSINESS
LEARN MORE >>	LIGHTING
GET STARTED >>	LEARN MORE >>
	GET STARTED >>

Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Submitted to LDC	20/05/2011 4:09:25 PM	View

- B. The system will display a summary of the **RETROFIT PROGRAM** Application contents as shown below.

PROGRAMS EFFICIENCY TIPS & TOOLS ALL INCENTIVES

saveONenergy RETROFIT PROGRAM Application

A summary of the RETROFIT Application is provided below.

Applicant Contact Details

Name	Address	Contact Info	Company Name
Mr Bob Brown	6 Bloor Street Toronto, Ontario M1J3H9 Canada	Daytime Phone 4169999999 Fax Email bobbrownsbusiness@gmail.com	Bob's Business

[Click here for Retrofit Program Eligibility](#)

[Click here for Accepted Terms and Conditions in the Program Participant Agreement](#)



Project Summary:

Pre-Project Submission Summary

Total Estimated Project Cost	Total Assumed Demand Savings (kW)	Total Assumed Energy Savings (kWh)*	Total Estimated Incentive
\$21,500.00	28.1	191,675	\$10,750.00

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

External Funding:

Funding Provider:	Program:	Amount:
Ministry of Energy	OSTHI Program	\$6,000.00

Project Details for Site 1: (Location where equipment is to be installed)

Site Address	LDC Name:	LDC Account Number:	HST Number:
120 Hart Avenue Scarborough, Ontario M1K3H9	Algoma Power Inc. (Lead)	001 234 567 890 12345	12345 1234

Type of property or site

Office

Engineered Approach:

Project Cost	Assumed Demand Savings (kW)	Assumed Energy Savings (kWh)*	Estimated Incentive
\$21,500.00	28.1	191,675	\$11,240.00

Site 1 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Incentives**
\$21,500.00	28.1	191,675	\$10,750.00

Estimated Start Date:	Estimated Completion Date:
June 02, 2011	June 03, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

Uploaded Documents

	Document Type
Quote_2.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
Commercial High Bay Spec sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	Retrofit Engineered Approach Worksheet - Commercial High Bay Lighting

Back

Print

TIP: If the incentive for a project is greater than 50% of the project costs, the system will cap the incentive amount and display the revised amount as shown here.



12.2 Applicant Representative Submit to Applicant

If an Applicant Representative has completed the **RETROFIT PROGRAM** Application on behalf of an Applicant, the Applicant Representative will be directed to the '**Confirm and Submit**' section where they will be able to submit the application to the Applicant for final review. It is then up to the Applicant to submit the application to the local electric utility for review and pre-approval. The process to do this is as follows:

- A. The Applicant Representative must verify that each section of the **RETROFIT PROGRAM** Application has been successfully completed. The system will display a warning sign (⚠) beside the section that is not completed and a check mark (✓) if all required fields within the **RETROFIT PROGRAM** Application have been completed.

- B. The Applicant Representative must click '**Submit to applicant**'



- C. Once the application has been submitted to the Applicant, the system will do the following:
- Direct the Applicant Representative back to their main user account landing page as shown in the screen shot below.
 - Change the status of the application to **'Pre-Project Application – Sent to Applicant for Review'** which is visible to both the Applicant and Applicant Representative.
 - The system will allow the Applicant Representative **'View'** abilities to the submitted application.
 - The system will allow the Applicant **'Review'** abilities to the submitted application.
 - The system will also generate an email notification to the Applicant and cc the Applicant Representative notifying them that an application has been submitted on their behalf and is waiting their review.

Logged in as the Applicant Representative.

Account Summary
John Smith Logout

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Welcome Back John Smith

Account Details

John Smith
7 Road Walk
Toronto, Ontario M4L2J1
Canada

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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Send to Applicant for Review	20/05/2011 3:56:57 PM	View

C (ii) points to the status: Pre-Project Application - Send to Applicant for Review

C (iii) points to the View button



- D. The Applicant must login to their user account to access the application completed and submitted by the Applicant Representative.

Logged in as the Applicant.

Account Summary
Bob Brown Logout

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Welcome Back Bob Brown

Account Details

Bob Brown
6 Bloor Street Suite 1800
Toronto, Ontario M1J3H9
Canada

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Status of your Applications

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Sent to Applicant for Review	20/05/2011 3:57:23 PM	Review

- E. The Applicant must click 'Review'.

- F. The system will display a summary of the **RETROFIT PROGRAM** Application details entered by the Applicant Representative as shown in the screen shots below.

saveONenergy RETROFIT PROGRAM Application

A summary of the RETROFIT Application is provided below.

Applicant Contact Details

Name	Address	Contact Info	Company Name
Mr Bob Brown	6 Bloor Street Toronto, Ontario M1J3H9 Canada	Daytime Phone 4169999999 Fax Email bobbrownsbusiness@gmail.com	Bob's Business

[Click here for Retrofit Program Eligibility](#)
[Click here for Accepted Terms and Conditions in the Program Participant Agreement](#)



Applicant Rep Contact Details (Only completed if you have a vendor or other third party to be the main point of contact.)

Name	Address	Contact Info
Mr John Smith	7 Road Walk Toronto, Ontario M4L2J1 Canada	Daytime Phone 4169991234 Fax Email ABCconsultingfirm@gmail.com

Project Summary:

Pre-Project Submission Summary

Total Estimated Project Cost	Total Assumed Demand Savings (kW)	Total Assumed Energy Savings (kWh)*	Total Estimated Incentive
\$1,241,551.50	395.32	1,790,375	\$313,596.30

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

Project Details for Site 1: (Location where equipment is to be installed)

Site Address	LDC Name:	LDC Account Number:	HST Number:
120 Brock Ridge E Suite 1300 Toronto, Ontario M4L3J3	Atikokan Hydro Inc. (Lead)	001 234 567 890 1234 5	12345 1234

Type of property or site

Multi-Residential - Social Housing Provider

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Incentive
\$4,200.00	2.22	\$1,500.00

Engineered Approach:

Project Cost	Assumed Demand Savings (kW)	Assumed Energy Savings (kWh)*	Estimated Incentive
\$27,134.00	28.1	191,675	\$20,096.30

Custom Approach:

Project Cost	Assumed Demand Savings (kW)	Assumed Energy Savings (kWh)*	Estimated Incentive
\$1,210,217.50	365	1,598,700	\$292,000.00

Site 1 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Incentives**
\$1,241,551.50	395.32	1,790,375	\$313,596.30

Estimated Start Date:	Estimated Completion Date:
May 18, 2011	May 19, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as approved by your local electric utility.

Estimated Tenant Education:	Estimated Social Housing:
\$31,359.63	\$307,179.45

TIP: If the applicant elected to receive Tenant Education Incentive, the system will calculate and display the eligible amount in the 'View' page.

TIP: If the applicant elected to receive Social Housing Adder, the system will calculate and display the eligible amount in the 'View' page.



Uploaded Documents

	Document Type
Tenant Education Proposal - sample .pdf	Retrofit - Tenant Education
RETROFIT-Lighting-Eligible-Measures -Worksheet-_-v1-0---March-2011_COI(1).xls	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_2.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Exit sign Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Standard T8 lamp Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Quote_4.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
Quote_3.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
VFD Technical Sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
Commercial High Bay Spec sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
VSD-on-Fan-Worksheet- Bob Business.xls	Retrofit Engineered Approach Worksheet - VSD on Fan
RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	Retrofit Engineered Approach Worksheet - Commercial High Bay Lighting
Quote_5.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Quote_6.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Chiller with VFD Technical Sheet.pdf	Retrofit Custom Approach - Cut Sheets or Detailed Manufacturers Data
Custom Project calculations.doc	Retrofit Custom Approach - Supporting Calculations
Sample Proposed Custom Project M&V Plan.doc	Retrofit Custom Approach - EMV Plan

Option 1

Option 2

☐ * I have read and agree to the program [terms and conditions](#).

Approve Application

Reject

Print

The Applicant has 2 options at this point in the **RETROFIT PROGRAM** Application process, both of which are described in the sections below:

Option 1: Submit the application to the local electric utility for review and pre-approval based on the summary view of the application.

Option 2: Reject the application so that;

- The Applicant can modify the application and submit to the local electric utility
- The Applicant Representative can make further modifications and re-submit to the Applicant.



12.2.1 Option 1: Approve Application

If the Applicant is satisfied with the information provided in the summary view of the **RETROFIT PROGRAM** application provided by the Applicant Representative, the Applicant can submit to the local electric utility for review and pre-approval. The process to do this is described below:

- A. Review and accept the **RETROFIT PROGRAM** Participant Agreement by clicking the box as shown in the screen shot below
- B. Click the '**Approve Application**' button as shown in the below screen shot

Uploaded Documents

	Document Type
Tenant Education Proposal - sample .pdf	Retrofit - Tenant Education
RETROFIT-Lighting-Eligible-Measures -Worksheet- -v1-0---March-2011_CO(1).xls	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_2.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Exit sign Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Standard T8 lamp Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Quote_4.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
Quote_3.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
VFD Technical Sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
Commercial High Bay Spec sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
VSD-on-Fan-Worksheet- Bob Business.xls	Retrofit Engineered Approach Worksheet - VSD on Fan
RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	Retrofit Engineered Approach Worksheet - Commercial High Bay Lighting
Quote_5.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Quote_6.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Chiller with VFD Technical Sheet.pdf	Retrofit Custom Approach - Cut Sheets or Detailed Manufacturers Data
Custom Project calculations.doc	Retrofit Custom Approach - Supporting Calculations
Sample Proposed Custom Project M&V Plan.doc	Retrofit Custom Approach - EMV Plan

A

B

☐ * I have read and agree to the program [terms and conditions](#).

Approve Application

Reject

Print



- C. Once the Applicant has clicked the **'Approve Application'** button, the system will:
- Direct the Applicant back to their main user account landing page as shown in the screen shot below.
 - Change the status of the application to **'Pre-Project Application – Submitted to LDC'**
 - The system will generate an email notification to the local electric utility notifying them of the **RETROFIT PROGRAM** Application submission.

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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Submitted to LDC	20/05/2011 4:09:25 PM	View



12.2.2 Option 2: Reject Application

If the Applicant is not satisfied with the information provided in the summary view of the **RETROFIT PROGRAM** application provided by the Applicant Representative, the applicant can reject the application. The process to do this is described below:

- A. The Applicant must click the **'Reject'** button as shown in the screen shot below:

Uploaded Documents

	Document Type
Tenant Education Proposal - sample.pdf	Retrofit - Tenant Education
RETROFIT-Lighting-Eligible-Measures-Worksheet--v-1-0---March-2011_CO(1).xls	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_2.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Exit sign Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Standard T8 lamp Spec sheet.pdf	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data
Quote_4.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
Quote_3.GIF	Retrofit Engineered Approach - Cost Estimates, Quotes or Proposals
VFD Technical Sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
Commercial High Bay Spec sheet.pdf	Retrofit Engineered Approach - Cut Sheets or Detailed Manufacturers Data
VSD-on-Fan-Worksheet- Bob Business.xls	Retrofit Engineered Approach Worksheet - VSD on Fan
RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	Retrofit Engineered Approach Worksheet - Commercial High Bay Lighting
Quote_5.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Quote_6.GIF	Retrofit Custom Approach - Cost Estimates, Quotes or Proposals
Chiller with VFD Technical Sheet.pdf	Retrofit Custom Approach - Cut Sheets or Detailed Manufacturers Data
Custom Project calculations.doc	Retrofit Custom Approach - Supporting Calculations
Sample Proposed Custom Project M&V Plan.doc	Retrofit Custom Approach - EMV Plan

☐ * I have read and agree to the program [terms and conditions](#).

[Approve Application](#) [Reject](#) [Print](#)





- B. Once the **'Reject'** button has been selected, the system will:
- Direct the Applicant back to their main account landing page as shown in the screen shot below
 - Change the status of the application to **'Pre-Project Application – Submission Rejected by Applicant'** which is visible to both the Applicant and Applicant Representative
 - Enable **'Edit'** abilities to the application for both the Applicant and Applicant Representative
 - Generate an email notification to the Applicant Representative notifying them that the Applicant has not been approved.

WELCOME BACK Bob Brown

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Bob Brown
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Toronto, Ontario M1J3H9
Canada
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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Application - Submission Reject by Applicant	20/05/2011 4:07:27 PM	Edit

Once the application has been rejected, there are 2 options as described below:

Option 1: The Applicant can modify the application and submit to the local electric utility

Option 2: The Applicant Representative can make further modifications and re-submit to the Applicant.



13 Pre-Project Application Approval

Once the local electric utility has reviewed the **RETROFIT PROGRAM** Application and completed the necessary pre-project site visits, they are ready to provide approval to the Applicant to proceed in the **RETROFIT PROGRAM** project.

An Applicant will know when their **RETROFIT PROGRAM** Pre-Project Application has been approved when:

- A. They receive a system generated email notification advising them that the local electric utility has approved the application
- B. The status of the application on the main page of the Applicant's user account has been changed to **'Pre-project Review – Approved to Proceed by LDC'** as shown in the screen shot below.

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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Review - Approved to Proceed by LDC	20/05/2011 4:11:55 PM	View Add Post-Project Submission



14 Completing the Post-Project Submission

Once the Applicant has completed their pre-approved retrofit project, they have the ability to log back into their user account via the **saveONenergy** website and update the application with post-project details including:

- Upload invoices to support project completion
- Update the application with actual project start and completion dates
- Update project details such as demand and energy savings
- Update project costs with each approach

If the Applicant had previously assigned an Applicant Representative to complete the application process, the same individual has the option of completing the post-project submission as well.

The process to complete the Post-Project Submission, which would be the same if completed by an Applicant or Applicant Representative, is as follows:

- A. Log into your user account via **saveonenergy.ca**. Please see section 4 for more details.
- B. Locate the application which you would like to add post-project details to and click the **'Add Post-Project Submission'** button as per the screen shot below.

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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Brock, Toronto	Pre-Project Review - Approved to Proceed by LDC	20/05/2011 4:11:55 PM	View Add Post Project Submission

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--	---

TIP: Only applications which have been approved to proceed by the local electric utility will have the ability to Add Post-Project information.

B



- C. The system will direct you to the following page which lists the facilities included in the application.

- D. Click the **'Add Post-Project Submission'** hyperlink.
- E. The system will direct you to the beginning of the **'Site and Project Details'** section of the application as shown in the screen shot below. Notice that fields which are not editable will be grayed out by the system.



* City
Toronto

* Province
Ontario

* Postal Code
M4L3J3

* Local electricity distribution company (LDC)
Atikokan Hydro Inc.

* HST Registrant #:
12345 1234

If you receive an electric utility bill, please provide your Hydro Account #. Please contact your local electric utility if you need further assistance.

001 234 567 890 1234 5

* Check one
☒ Owner ☐ Tenant/Leaseholder

Building/Property Details

* Building/property type(s)
☒ Multi-Residential - Social Housing Provider

Social Housing Adder

If you are a [Social Housing Provider](#) and would like to apply for the [Social Housing Adder](#) and [Participant Advance Payment](#), please click here: ☒

Tenant Education Incentive

If you are a [Multi-Family Housing Provider](#) and would like to apply for the [Tenant Education Incentive](#), please click here: ☒

Please upload your Tenant Education Proposal below. For more information about the available tenant education options, please click [here](#).

[Tenant Education Proposal - sample .pdf](#)

* Approximate year the building was built
1960

* Approximate total facility area (sq. ft.) of retrofitted area
60000

* Total Number of Floors
10

* Type of Existing Cooling System (e.g. unitary AC, chiller)
chiller

* Type of Existing Heating System (e.g. boiler, furnace)
boiler

Other Comments (for example, special site requirements or conditions which Project Evaluators should be aware of)

Safety boots required for site visit

Actual Project Timelines (Estimated Timelines are provided as default)

* Actual Project Start Date:

26/05/2011

* Actual Project Completion Date:

30/06/2011

F

Previous

Next

G



- F. Update the '**Actual Project Start Date**' and '**Actual Project Completion Date**'. The system will default these fields to the estimated project start and completion dates provided during pre-project submission.
- G. Click '**Next**' to proceed in the post-project submission process.



14.1 Prescriptive Approach

If the Applicant completed the Prescriptive Approach as part of their pre-project application submission, the system will direct them to the following page where they will have the opportunity to update the following information:

1. Prescriptive Approach Project Cost:
 - A. Update the Prescriptive Project Cost by entering a new value into the '**Prescriptive Approach Actual Project Cost**' field.
2. Update the prescriptive measures by doing either of the following:
 - A. Click the '**Remove**' hyperlink located beside the measure name to remove a prescriptive measure entirely

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saveONenergy RETROFIT PROGRAM Post-Project Submission

Site and Project Details Confirm and Submit Save and return at a later date

Prescriptive Approach Details

The information below was entered during the initial (Pre-Project) Application. Please update actual values if they have changed. Measure quantity can be changed, or measures can be removed, but new measures cannot be added.

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Prescriptive Approach Actual Project Cost

4150

1(A)

Standard Performance T-8 fixture - Single-lamp@ \$12.00 * 100 = \$1,200.00	Remove	Update Quantity
New Exit Signs - 5 Watt or less@ \$15.00 * 20 = \$300.00	Remove	Update Quantity


2(A)

Prescriptive Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$1,500.00



- i. Clicking the '**Remove**' hyperlink will trigger the system to change the quantity of the selected prescriptive measure to '**Not Installed**' as shown in the screen shot below
- ii. The system will also update the '**Prescriptive Approach Actual Incentive**' amount when the '**Remove**' hyperlink is clicked



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saveONenergy RETROFIT PROGRAM Post-Project Submission

[Site and Project Details](#) [Confirm and Submit](#) [Save and return at a later date](#)

Prescriptive Approach Details

The information below was entered during the initial (Pre-Project) Application. Please update actual values if they have changed. Measure quantity can be changed, or measures can be removed, but new measures cannot be added.

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Prescriptive Approach Actual Project Cost
\$4,150.00

Standard Performance T-8 fixture: Single-lamp - Not installed	Remove	Update Quantity
New Exit Signs - 5 Watt or less@\$15.00 * 20 = \$300.00	Remove	Update Quantity


Prescriptive Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$300.00**

2(A)(i)

2(A)(ii)




- B. Click the **'Update Quantity'** hyperlink located beside the measure name to update the quantity of the prescriptive measure



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[Site and Project Details](#) [Confirm and Submit](#) [Save and return at a later date](#)

Prescriptive Approach Details

The information below was entered during the initial (Pre-Project) Application. Please update actual values if they have changed. Measure quantity can be changed, or measures can be removed, but new measures cannot be added.

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Prescriptive Approach Actual Project Cost

4150

Standard Performance T-8 fixture: Single-lamp@\$12.00 * 100 = \$1,200.00	Remove	Update Quantity
New Exit Signs - 5 Watt or less@\$15.00 * 20 = \$300.00	Remove	Update Quantity

Prescriptive Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$1,500.00

B



- i. Once the 'Update Quantity' hyperlink is clicked for a prescriptive measure, the system will expand as shown in the screen shot below.



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Prescriptive Approach Details

The information below was entered during the initial (Pre-Project) Application. Please update actual values if they have changed. Measure quantity can be changed, or measures can be removed, but new measures cannot be added.

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
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- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Prescriptive Approach Actual Project Cost

\$4,150.00

Standard Performance T-8
fixture: Single-lamp - Not
Installed

[Remove](#)

[Update
Quantity](#)

New Exit Signs - 5 Watt or
less@ \$15.00 * 20 = \$300.00

[Remove](#)

[Update
Quantity](#)

Measure

New Exit Signs - 5 Watt or less

* Actual Quantity

15

2(B)(ii)

2(B)(i)


2(B)(iii)

[Update](#)

[Cancel](#)




- ii. Update the quantity by entering a new value in the 'Actual Quantity' field.
- iii. Click the 'Update' button to update the quantity for the selected prescriptive measure.
- iv. Once the 'Update' button is clicked, the system will update the quantity and incentive amount for the prescriptive measure as shown in the screen shot below.
- v. The system will also update the 'Prescriptive Approach Actual Incentive' amount.



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Confirm and Submit

Save and return at a later date

Prescriptive Approach Details

The information below was entered during the initial (Pre-Project) Application. Please update actual values if they have changed. Measure quantity can be changed, or measures can be removed, but new measures cannot be added.

The details in this section apply only to prescriptive measures included in your project. To complete this section, you will be required to provide project costs, select the prescriptive measures and enter quantities which you are installing and upload supporting documentation.

- [Lighting Eligible Measures List](#)
- [Unitary AC Eligible Measures List](#)
- [Motors Eligible Measures List](#)
- [Variable Frequency Drive Eligible Measures List](#)
- [Multi-Residential In-Suite Appliance Eligible Measures List](#)
- [Alternative Energy Eligible Measures List](#)
- [Synch Belt Eligible Measures List](#)
- [Agribusiness Eligible Measures List](#)

Prescriptive Approach Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

* Prescriptive Approach Actual Project Cost

\$4,150.00

Standard Performance T-8 fixture: Single-lamp - Not Installed	Remove	Update Quantity
New Exit Signs - 5 Watt or less @ \$15.00 * 15 = \$225.00	Remove	Update Quantity

2(B)(iv)

Prescriptive Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

2(B)(v)

\$225.00



3. Upload additional documents to support project completion under the **‘Supporting Documentation’** section.

Note: documents uploaded during the pre-project application process cannot be removed.

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Completed Prescriptive Worksheets & Estimated Project cost details uploaded during the Pre-Project Application

[RETROFIT-Lighting-Eligible-Measures -Worksheet- -v-1-0--March-2011_CO\(1\).xls](#)

[Quote_2.GIF](#)

[Quote_1.GIF](#)

NOTE: Documents uploaded during the pre-project application process cannot be removed but can be viewed by clicking on the hyperlinked document

Updated Post-Project Prescriptive Worksheets & Eligible Project Cost Details

● Invoice_1.gif ✕ Remove

3

Manufacturer technical specification sheets uploaded during the Pre-Project Application

[Exit sign Spec sheet.pdf](#)

[Standard T8 lamp Spec sheet.pdf](#)

Updated Manufacturer technical specification sheets

4

4. Once the prescriptive approach has been updated to reflect the post-project completion details, click **‘Next’** to proceed in the post-project submission.



14.2 Engineered Approach

If the Applicant has completed the Engineered Approach as part of their Pre-Project Application, the system will direct them to the following page where they will have the opportunity to update the following information:

1. Engineered Approach Project Costs:
 - A. Update the Engineered Project Costs by entering new values under the '**Engineered Approach Actual Project Cost**' heading.
 - B. Click the '**Update**' button to update the '**Engineered Approach Project Cost**' to reflect the revised total project cost.

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[Site and Project Details](#) [Confirm and Submit](#) [Save and return at a later date](#)

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

- [Sample Engineering Tool](#)

Engineered Approach Actual Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

Estimated costs of labour for the installation of the equipment by suppliers


Estimated costs to dispose of or decommission the replaced equipment

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations

Engineered Approach Actual Project Cost **\$27,134.00** [Update](#)




- C. Once the **'Update'** button has been clicked, the system will update the **'Engineered Approach Project Cost'** field.
2. Upload additional documents to support project completion under the **'Supporting Documentation'** section.



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[Site and Project Details](#) | [Confirm and Submit](#) | [Save and return at a later date](#)

Engineered Approach Details

The details in this section apply only to Engineered Measures included in your project. To complete this section, you will be required to provide project costs, select the Engineered Worksheet Type and upload the completed worksheet associated with the measures you are installing as well as upload supporting documentation.

- [Sample Engineering Tool](#)

Engineered Approach Actual Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

Estimated costs of labour for the installation of the equipment by suppliers

Estimated costs to dispose of or decommission the replaced equipment

Estimated costs of inspections of the Project as may be required pursuant to Laws and Regulations

Engineered Approach Actual Project Cost **\$26,460.00** [Update](#)

Supporting Documentation

Please upload the applicable completed Prescriptive Worksheet(s) available for download above, any and all quotes/estimates to support project costs and manufacturer technical specifications sheets.

Equipment cost estimates, quotes, proposals or invoices uploaded during the Pre-Project Application

[Quote_4.GIF](#)

[Quote_3.GIF](#)

Updated Post Project equipment cost estimates, quotes, proposals or invoices

Invoice_4.GIF

Remove

Invoice_3.GIF

Remove

[Select](#)

Manufacturer technical specification sheets uploaded during the Pre-Project Application

[VFD Technical Sheet.pdf](#)

[Commercial High Bay Spec sheet.pdf](#)

Updated Post Project Manufacturer technical specification sheets

[Select](#)

1 (C)

2



3. Update the engineered measures by doing either of the following:
 - A. Click the '**Remove**' hyperlink located beside the measure name to remove an engineered measure entirely.

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Engineered Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Actual Incentive		
VSD on Fan	VSD-on-Fan-Worksheet- Bob Business.xls	18.7	163363	\$16,336.30	Edit	Remove
Commercial High Bay Lighting	RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	9.4	28312	\$3,760.00	Edit	Remove

3 (A)

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$20,096.30

[Previous](#)

[Next](#)

- i. Clicking the '**Remove**' hyperlink will trigger the system to populate the Demand Savings and Energy Savings for the engineered measure with zero as shown in the screen shot below.
- ii. The system will also update the '**Engineered Approach Actual Incentive**' amount when the '**Remove**' hyperlink is clicked.

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Engineered Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Actual Incentive		
VSD on Fan	VSD-on-Fan-Worksheet- Bob Business.xls	0	0	\$0.00	Edit	Remove
Commercial High Bay Lighting	RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	9.4	28312	\$3,760.00	Edit	Remove

3(A)(i)

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$3,760.00

[Previous](#)

[Next](#)

3(A)(ii)



- B. Click the **'Edit'** hyperlink located beside the measure name to update the demand and/or energy savings of the prescriptive measure

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Engineered Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Actual Incentive		
VSD on Fan	VSD-on-Fan-Worksheet- Bob Business.xls	0	0	\$0.00	Edit	Remove
Commercial High Bay Lighting	RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls	9.4	28312	\$3,760.00	Edit	Remove

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$3,760.00

3(B)

[Previous](#)

[Next](#)

- i. Clicking the **'Edit'** hyperlink will trigger the system to expand as shown in the screen shot below.

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Please select the Engineered Worksheet Type, upload the completed Engineered Worksheet, enter the Demand Savings (kW) and Energy Savings (kWh) then click 'Save & Add' for each measure.

* Please select the applicable Engineered Worksheet Type from the drop-down list below

Commercial High Bay Lighting

* Please upload the applicable Engineered Worksheet below

[RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls](#)

Select

* Please enter the Demand Savings (kW) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

10.5

* Please enter the Energy Savings (kWh) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

28312

[Save & Add](#)

[Cancel](#)

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$3,760.00

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[Next](#)

3(B)(i)

3(B)(ii)



- iii. Upload a revised engineered worksheet to reflect the changes in the Demand Savings and/or Energy Savings. The system will not allow you to proceed until a new document is uploaded as shown in the screen shot below.

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate **Demand Savings (kW)** and **Energy Savings (kWh)**, please complete the applicable Engineered Worksheet(s) available for download above.

Please select the Engineered Worksheet Type, upload the completed Engineered Worksheet, enter the Demand Savings (kW) and Energy Savings (kWh) then click 'Save & Add' for each measure.

* Please select the applicable Engineered Worksheet Type from the drop-down list below

Commercial High Bay Lighting

* Please upload the applicable Engineered Worksheet below

[RETROFIT Commercial High Bay Lighting Engineering Worksheet - v1.0 - March 2011_TEST.xls](#)

RETROFIT Commercial Interior Lighting Engineering Worksheet **Select**

Because Energy Savings or Demand Savings have changed, a new Worksheet is required

* Please enter the Demand Savings (kW) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

10.5

* Please enter the Energy Savings (kWh) for the purpose of calculating the Participant Incentive as per the 'Outputs' tab of the Engineered Worksheet

28312

Save & Add **Cancel**

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$3,760.00**

Previous **Next**

3(B)(iii)

3(B)(iv)

- iv. Click '**Save & Add**' to update the engineered measure with the adjustments made.



- v. Clicking the '**Save & Add**' button will trigger the system to update the '**Demand Savings**' and/or '**Energy Savings**' with the revised values.
- vi. The system will also re-calculate the '**Actual Incentive**' based on the revised Demand Savings and Energy Savings
- vii. Clicking the '**Save & Add**' button will also update the '**Engineered Approach Actual Incentive**' amount.

Engineered Worksheets

Please select the "Add Engineered Measure" button below to add an Engineered Measure to your project. You will then be prompted to upload worksheets and provide information associated with the Engineered Measure. There is no limit to the number of measures you can add to your project.

On clicking "Add Engineered Measure" any previously added Engineered Measures will be temporarily hidden from the user while the new Engineered Measure information is entered.

To calculate [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#), please complete the applicable Engineered Worksheet(s) available for download above.

Engineered Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Worksheet Type	Worksheet	Demand Savings	Energy Savings	Actual Incentive		
VSD on Fan	VSD-on-Fan-Worksheet- Bob Business.xls	0	0	\$0.00	Edit	Remove
Commercial High Bay Lighting	RETROFIT Commercial Interior Lighting Engineering Worksheet - REVISED to reflect project completion.xls.xls	10.5	28312	\$4,200.00	Edit	Remove

Engineered Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$4,200.00

[Previous](#)

[Next](#)

4

3(B)(v)

3(B)(vi)

3(B)(vii)

4. Once the engineered approach has been updated to reflect the post-project completion details, click '**Next**' to proceed in the post-project submission.



14.3 Custom Approach

If the Applicant has completed the Custom Approach as part of their Pre-Project Application, the system will direct them to the following page where they will have the opportunity to update the following information:

1. Upload additional documents to support project completion under the ‘**Supporting Documentation**’ section.

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Custom Approach Details

The details in this section apply only to Custom measures included in your project. To complete this section, you will be required to provide project costs, describe and enter information for each custom measure you are installing and upload supporting documentation.

The information below was entered during the initial (Pre-Project) Application. Please update the Actual Custom Project Costs and the Custom Worksheets below.

Base Case

* Describe the existing equipment, operation, process or service of your facility to be retrofitted. Include descriptions of existing equipment and identify manufacturer(s) and model number(s).

Carrier Chiller, Centrifugal High Pressure R12
861ton, 575V, NPLV 0.775 kW/ton Qty.-1
Model # 19EA910; Carrier Chiller, Centrifugal
High Pressure R12 861ton, 575V, NPLV 0.775

Energy Efficient Case

* Describe the proposed equipment, operation, process or service of your facility to include descriptions of proposed equipment and identify manufacturer(s) and model number(s).

Carrier Chiller, Centrifugal High Pressure R13a,
800 ton, 575V, free standing VFD, NPLV
0.377kW/ton Qty. - 2, Model # 19XR-
65654T5DGH65 Evapco Cooling Tower, 2

Supporting Documentation

Please upload the following documents, as applicable:
Equipment cost estimates, quotes, proposals or invoices uploaded during the Pre-Project Application

[Quote_5.GIF](#)

[Quote_6.GIF](#)

Upload Post-Project Equipment cost estimates, quotes, proposals or invoices

Invoice_5.GIF x Remove

Invoice_6.GIF x Remove

Select

Manufacturer technical specification sheets uploaded during the Pre-Project Application

[Chiller with VFD Technical Sheet.pdf](#)

Upload Post-Project Manufacturer technical specification sheets

Select

Supporting calculations for energy (kWh) and demand (kW) savings uploaded during the Pre-Project Application

[Custom Project calculations.doc](#)

Upload Post-Project Supporting calculations for energy (kWh) and demand (kW) savings

REVISED Custom Project calculations_post-completion.doc x Remove

Select

TIP: The base case and Energy Efficient Case descriptions cannot be edited in the post-project submission.



2. Custom Approach Project Costs:

- A. Update the Engineered Project Costs by entering new values under the '**Custom Approach Actual Project Cost**' heading.
- B. Click the '**Update**' button to update the '**Custom Approach Project Cost**' to reflect the revised total project cost.

Custom Approach Actual Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment

800700

Estimated or actual costs of labour for the installation of the equipment by suppliers

\$292,554.50

Estimated or actual costs to dispose of or decommission the replaced equipment

40500

Estimated or actual costs of energy audit assessments not funded by the OPA

\$0.00

Estimated or actual costs of design, engineering and/or architecture associated with the project

\$0.00

Estimated or actual project management costs provided by third parties

6000

Estimated or actual costs to deliver the equipment

\$5,000.00

Estimated or actual costs of inspection of the Project as may be required pursuant to Laws and Regulations

\$0.00

Estimated or actual costs to prepare and implement the Project M&V Plan or costs to assist the LDC in preparing supporting documentation

\$35,000.00

Custom Approach Actual Project Cost

\$ 1,210,217.50

Update

2(A)

2(B)

- C. Once the '**Update**' button has been clicked, the system will update the '**Custom Approach Project Cost**' field.



3. Update the custom measures by doing either of the following:
 - A. Click the **'Remove'** hyperlink located beside the measure name to remove a custom measure entirely.

Custom Approach Actual Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment
800700

Estimated or actual costs of labour for the installation of the equipment by suppliers
\$292,554.50

Estimated or actual costs to dispose of or decommission the replaced equipment
40500

Estimated or actual costs of energy audit assessments not funded by the OPA
\$0.00

Estimated or actual costs of design, engineering and/or architecture associated with the project
\$0.00

Estimated or actual project management costs provided by third parties
6000

Estimated or actual costs to deliver the equipment
\$5,000.00

Estimated or actual costs of inspection of the Project as may be required pursuant to Laws and Regulations
\$0.00

Estimated or actual costs to prepare and implement the Project M&V Plan or costs to assist the LDC in preparing supporting documentation
\$35,000.00

Custom Approach Actual Project Cost **2 (C)** **\$ 1,179,754.50** [Update](#)

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Custom Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Measure description	Base Case electricity demand (kW)	Base Case annual electricity consumption (kWh)	Energy Efficient Case electricity demand (kW)	Energy Efficient Case annual electricity consumption (kWh)	Demand Savings	Energy Savings	Project type	Calculated Participant Incentive	
Chiller upgrade	667	2921460	302	1322760	365	1598700	Non-Lighting	\$292,000.00	Edit Remove

Custom Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$292,000.00**



- B. Click the **'Edit'** hyperlink located beside the measure name to update the demand and/or energy savings of the prescriptive measure
- Clicking the **'Edit'** hyperlink will trigger the system to expand as shown in the screen shot below.
 - Update the Measure Description, Base Case electricity consumption (kWh), Energy Efficient Case electricity Demand (kW), Energy Efficient Case electricity demand (kW), Energy Efficient Case annual electricity consumption (kWh) and project type as applicable.

Custom Approach Actual Project Cost

Costs which are eligible to be included in determining applicable Participant Incentives must be invoiced costs directly related to the procurement and implementation of the Eligible Measures and are limited to the costs listed below. For a list of costs which are not eligible, please click [here](#). Please enter the applicable costs in the cells below.

Estimated costs of the equipment
800700

Estimated or actual costs of labour for the installation of the equipment by suppliers
\$292,554.50

Estimated or actual costs to dispose of or decommission the replaced equipment
40500

Estimated or actual costs of energy audit assessments not funded by the OPA
\$0.00

Estimated or actual costs of design, engineering and/or architecture associated with the project
\$0.00

Estimated or actual project management costs provided by third parties
6000

Estimated or actual costs to deliver the equipment
\$5,000.00

Estimated or actual costs of inspection of the Project as may be required pursuant to Laws and Regulations
\$0.00

Estimated or actual costs to prepare and implement the Project M&V Plan or costs to assist the LDC in preparing supporting documentation
\$35,000.00

Custom Approach Actual Project Cost **\$ 1,179,754.50** [Update](#)

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Measure description
Chiller upgrade

Base Case electricity demand (kW)
667

Base Case annual electricity consumption (kWh)
2921450

Energy Efficient Case electricity demand (kW)
291

Energy Efficient Case annual electricity consumption (kWh)
1322760

Please identify which type of project you are applying for
Non-Lighting ☒ [Help](#)

[Save & Add](#) [Cancel](#)

Custom Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level) **\$292,000.00**

3(B)(i)

3(B)(ii)

3(B)(iii)



- iii. Click **'Save & Add'** to update the custom measure with the adjustments made.
- iv. Clicking the **'Save & Add'** button will trigger the system to update the **'Measure Description'**, **'Base Case electricity consumption (kWh)'**, **'Energy Efficient Case electricity Demand (kW)'**, **'Energy Efficient Case electricity demand (kW)'**, **'Energy Efficient Case annual electricity consumption (kW)'** and **'Project type'** as applicable.
- v. Clicking the **'Save & Add'** button will also trigger the system to re-calculate and display the **'Demand Savings'** and/or **'Energy Savings'** with the revised values.
- vi. The system will also re-calculate the **'Calculated Participant Incentive'** based on the revised Demand Savings and Energy Savings
- vii. Clicking the **'Save & Add'** button will also update the **'Custom Approach Actual Incentive'** amount.

Custom Project Energy & Demand Savings

Please select the "Add Custom Measure" button below to add a Custom Measure to your project. You will then be prompted to provide Base Case and Energy Efficient Case electricity demand and consumption values associated with the Custom Measure. The system will calculate the associated [Demand Savings \(kW\)](#) and [Energy Savings \(kWh\)](#) from these values for determination of the estimated incentive amount. There is no limit to the number of measures you can add to your project.

On clicking "Add Custom Measure" any previously added Custom Measures will be temporarily hidden from the user while the new Custom Measure information is entered.

For projects with estimated Custom Measure Incentives greater than \$10,000 a Project Measurement and Verification (M&V) Plan is required. Please refer to the [Project M&V Procedures](#) for the Project M&V requirements.

Custom Worksheets cannot be added at the Post-Project submission stage. The below worksheets were added during the Pre-Project Application process and they can be edited or removed (removing a worksheet sets numeric values to 0, indicating that it was not implemented on the project).

Measure description	Base Case electricity demand (kW)	Base Case annual electricity consumption (kWh)	Energy Efficient Case electricity demand (kW)	Energy Efficient Case annual electricity consumption (kWh)	Demand Savings	Energy Savings	Project type	Calculated Participant Incentive	
Chiller upgrade	667	2921460	291	1322760	376	1598700	Non-Lighting	\$300,800.00	Edit Remove

Custom Approach Actual Incentive (Incentives may be subject to a cap based on Total Project Cost at the Project Level)

\$300,800.00

Based on the Total Participant Incentive Amount Requested, a Project M&V Plan is required for the Custom Measures included in this Project. For additional information, refer to the [Project M&V Procedures](#).

[Sample Proposed Custom Project M&V Plan.doc](#)

Please upload the actual Project M&V Plan below:

[Previous](#)

[Next](#)

5

4

4. If the project contains custom measures with an incentive amount greater or equal to \$10,000, the system will provide an opportunity to upload documents to support any changes to the Project M&V Plan.
5. Once the engineered approach has been updated to reflect the post-project completion details, click **'Next'** to proceed in the post-project submission.



14.4 Post-Project Application Summary

Once the post-project details have been updated within the prescriptive, engineered and/or custom approaches, the system will provide a summary of the pre-project application details and post-project application details as shown in the screen shot below. To proceed in the post-project application process, click **'Next'**.

saveONenergy RETROFIT PROGRAM Post-Project Submission

Site and Project Details	Confirm and Submit	Save and return at a later date
--	------------------------------------	---

Pre-Project Application Summary

This is a summary of the project information provided in the Pre-Project Application.

	Total Costs	Assumed Demand Savings (kW)	Assumed Energy Savings (kWh)*	Estimated Incentive
Prescriptive Approach	\$4,200.00	2.220	0	\$1,500.00
Engineered Approach	\$27,134.00	28.1	191675	\$20,096.30
Custom Approach	\$1,210,217.50	365	1598700	\$292,000.00
Total	\$1,241,551.50	395.320	1790375	\$313,596.30

*The Energy Savings (kWh) summary value excludes Prescriptive Measures

Project Cost Cap**:	\$620,775.75
Estimated Participant Incentive:	\$313,596.30
Social Housing Provider Adder:	\$307,179.45
Tenant Education Incentive:	\$31,359.63
Total Estimated Incentive Available:	\$652,135.38

Post-Project Submission Summary

This is a summary of the project information provided in the Post-Project Submission. The project electricity savings and associated Participant Incentives are subject to review and potential adjustment by the local electric utility.

	Total Costs	Assumed Demand Savings (kW)	Assumed Energy Savings (kWh)*	Actual Incentive
Prescriptive Approach	\$4,150.00	0.390	0	\$225.00
Engineered Approach	\$26,460.00	10.5	28312	\$4,200.00
Custom Approach	\$1,179,754.50	376	1598700	\$300,800.00
Total	\$1,210,364.50	386.890	1627012	\$305,225.00

*The Energy Savings (kWh) summary value excludes Prescriptive Measures

Project Cost Cap**:	\$605,182.25
Actual Participant Incentive:	\$305,225.00
Social Housing Provider Adder:	\$299,957.25
Tenant Education Incentive:	\$30,522.50
Total Actual Incentive Available:	\$635,704.75

** The Project Cost Cap is based on 50% of the actual Total Project Costs to a maximum of 55% of the estimated Total Project Costs as originally approved by your local electric utility.

Previous	Next
--------------------------	----------------------

TIP: Before clicking **'Next'** to proceed, it's a good idea to print this page from your web browser.

If the Total Actual Incentive amount is 10% greater than the Total Estimated Incentive amount, the system will cap the Final Incentive amount and display here.



At this point in the application process, the post-project submission has been added for the facility as shown in the screen shot below.

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For Business > Programs

saveONenergy RETROFIT PROGRAM Post-Project Submission

[Site and Project Details](#) [Confirm and Submit](#) [Save and return at a later date](#)

Once you have completed your project and are ready to submit additional documentation to support your final incentive claim, you must complete a Post-Project submission. Please click 'Add Post-Project Submission' to proceed.

For Head Office Applications, you are required to complete the Post-Project Submission for each building/facility.

Buildings listed on this application

Building #1 120 Brock Ridge E LDC - Atikokan Hydro Inc.	Complete Add Post-Project Submission
---	--

[Next](#)

Click 'Next' to proceed in the 'Confirm and Submit' section of the post-project submission.



14.5 Post-Project Submissions for Head Office Projects

If a Head Office Application was submitted, post-project details must be added for each facility included in the Pre-Project Application. The process to complete the post-project submission is as detailed in the above sections.

The screen shot below indicates that the post-project details have been added for '**Building #1**' but '**Building #2**' still requires the post-project submission to be completed.

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saveONenergy RETROFIT PROGRAM Post-Project Submission

[Site and Project Details](#) [Confirm and Submit](#) [Save and return at a later date](#)

Once you have completed your project and are ready to submit additional documentation to support your final incentive claim, you must complete a Post-Project submission. Please click 'Add Post-Project Submission' to proceed.

For Head Office Applications, you are required to complete the Post-Project Submission for each building/facility.

Buildings listed on this application

Building #1 120 Adelaide Square LDC - Atikokan Hydro Inc.	Complete	Add Post-Project Submission
Building #2 33 Hart Abbey LDC - Atikokan Hydro Inc.	Submission Required	Add Post-Project Submission

Lead local electricity distribution company (LDC) for this Head Office Project
Atikokan Hydro Inc.

[Next](#)

Post-Project details must be added to each facility.



15 Confirm and Submit

The **'Confirm and Submit'** section is the final step prior to submitting the post-project submission to the local electric utility for further review and approval of the final participant incentive amount. The process to complete this section is as detailed below:

- A. Verify that each section of the **RETROFIT PROGRAM** Post-Project Application has been successfully completed. The system will display a warning sign (⚠) beside the section that is not completed and a check mark (✓) if all required fields within the **RETROFIT PROGRAM** Application have been completed.
- B. Click **'Submit'** to submit the post-project submission as shown in the screen shot below.



- C. The system will display a final confirmation message prior to submitting to the local electric utility as shown below. Click 'OK' to submit the post-project submission.

The screenshot displays the 'saveONenergy RETROFIT PROGRAM Post-Project Submission' page. At the top, there is a navigation bar with links for Home, About Us, Resources, and Contacts. Below this, a dark grey bar contains the text 'PROGRAMS FIND PROGRAMS IN MY AREA EFFICIENCY TIPS & TOOLS ALL INCENTIVES'. The main content area is titled 'saveONenergy RETROFIT PROGRAM Post-Project Submission'. It features three tabs: 'Site and Project Details', 'Confirm and Submit', and 'Save and return at a later date'. The 'Confirm and Submit' tab is active, showing a confirmation message: 'You have now completed all required information in the application. Please review the information entered is accurate before clicking Submit.' Below this message, there is a list of site details with a green checkmark next to each item: 'Site and Project Details', 'Building #1', '120 Brock Ridge E', and 'LDC - Atikokan Hydro Inc.'. At the bottom of the page, there are two buttons: 'Previous' and 'Submit'. A green box with the letter 'C' points to the 'OK' button in the confirmation dialog box.



- D. Once the post-project submission has been successfully submitted, the system will do the following:
- The system will direct the Applicant back to their main user account landing page
 - Change the status of the application to **'Post-Project Submission – Submitted to LDC for Approval'** as shown below.
 - Enable **'View'** abilities to the application

ONTARIO POWER AUTHORITY

Home About Us Resources Contacts

Account Summary
Bob Brown Logout

FOR HOME FOR BUSINESS FIND PROGRAMS IN MY AREA

Welcome Back Bob Brown

Account Details

Bob Brown
6 Bloor Street Suite 1800
Toronto, Ontario M1J3H9
Canada

[EDIT ACCOUNT DETAILS >>](#)
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Programs available to you

RETROFIT PROGRAM LEARN MORE >> GET STARTED >>	SMALL BUSINESS LIGHTING LEARN MORE >> GET STARTED >>
--	---

Status of your Applications

Name	Status	Last Update	Actions
120 Brock, Toronto	Post-Project Submission - Submitted to LDC for Approval	25/05/2011 1:39:45 PM	View



15.1 Applicant Representative Submit to Applicant

If an Applicant Representative has completed the Post-Project submission on behalf of an Applicant, they will be directed to the **'Confirm and Submit'** section where they will be able to submit the application to the Applicant for final review. It is then up to the Applicant to submit the post-project submission to the local electric utility for review and approval of the final participant incentive amount. The process to do this is as follows:

- A. The Applicant Representative must verify that each section of the Post-Project submission has been successfully completed. The system will display a warning sign (⚠) beside the section that is not completed and a check mark (✓) if all required fields within the Post-Project Submission have been completed.

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Logged in as the Applicant Representative.

Account Summary John Smith Logout

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For Business > Programs

saveONenergy RETROFIT PROGRAM Post-Project Submission

Site and Project Details Confirm and Submit Save and return at a later date

Confirm and Submit

You have now completed all required information in the Post-Project Application. Please ensure that the information entered is accurate before clicking Submit.

✓ Site and Project Details

✓ Building #1
120 Adelaide Square
LDC - Atikokan Hydro Inc.

✓ Building #2
33 Hart Abbey
LDC - Atikokan Hydro Inc.

By clicking 'Submit to Applicant', the completed application will be sent to the applicant for review. The applicant will then have the option of either providing the applicant representative with an opportunity to correct any errors by clicking 'Reject' or if they are satisfied with the information provided, click 'Submit' for the application to be sent to their local electric utility for review and approval.

Previous Submit to applicant

- B. The Applicant Representative must click **'Submit to applicant'**



- C. Once the post-project submission has been submitted to the Applicant, the system will do the following:
- Direct the Applicant Representative back to their main user account landing page as shown in the screen shot below.
 - Change the status of the application to **'Post-Project Submission – Sent to Applicant for Review'** which is visible to both the Applicant and Applicant Representative.
 - The system will allow the Applicant Representative **'View'** abilities to the submitted application.
 - The system will allow the Applicant **'Review'** abilities to the submitted application.
 - The system will also generate an email notification to the Applicant and cc the Applicant Representative notifying them that an application has been submitted on their behalf and is waiting their review.

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Logged in as the Applicant Representative.

Account Summary
John Smith | Logout

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Welcome Back John Smith

Account Details

John Smith
7 Road Walk
Toronto, Ontario M4L2J1
Canada

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	GET STARTED >>

Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Adelaide, Toronto	Post-Project Submission - Send to Participant for Review	26/05/2011 9:59:34 AM	View

C(ii) points to the Status column.

C(iii) points to the View button.



- D. The Applicant must login to their user account to access the post-project submission completed and submitted by the Applicant Representative.

Logged in as the Applicant

Account Summary
Bob Brown Logout

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Welcome Back Bob Brown

Account Details
Bob Brown
6 Bloor Street Suite 1800
Toronto, Ontario M1J3H9
Canada
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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Adelaide, Toronto	Post-Project Submission - Sent to Participant for Review	26/05/2011 9:59:58 AM	Review

C(ii)

E

- E. The Applicant must click 'Review'.
- F. The system will display a summary of the **RETROFIT PROGRAM** Application including the pre-project and post-project details as shown in the screen shots below.

Account Summary
Bob Brown Logout

PROGRAMS FIND PROGRAMS IN MY AREA EFFICIENCY TIPS & TOOLS ALL INCENTIVES

saveONenergy RETROFIT PROGRAM Application

A summary of the RETROFIT Application is provided below.

Applicant Contact Details

Name	Address	Contact Info	Company Name
Mr Bob Brown	6 Bloor Street Toronto, Ontario M1J3H9 Canada	Daytime Phone 4169999999 Fax Email bobbrownsbusiness@gmail.com	Bob's Business

[Click here for Retrofit Program Eligibility](#)
[Click here for Accepted Terms and Conditions in the Program Participant Agreement](#)

Applicant Rep Contact Details (Only completed if you have a vendor or other third party to be the main point of contact.)

Name	Address	Contact Info
Mr John Smith	7 Road Walk Toronto, Ontario M4L2J1 Canada	Daytime Phone 4169991234 Fax Email ABCconsultingfirm@gmail.com



Project Summary:

Pre-Project Submission Summary

Total Estimated Project Cost	Total Assumed Demand Savings (kW)	Total Assumed Energy Savings (kWh)*	Total Estimated Incentive
\$11,000.00	44.8568	0	\$36,070.00

Post-Project Submission Summary

Total Actual Project Cost	Total Assumed Demand Savings (kW)	Total Assumed Energy Savings (kWh)*	Total Estimated Actual Incentive
\$11,000.00	44.8568	0	\$36,070.00

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

Project Details for Site 1: (Location where equipment is to be installed)

Site Address	LDC Name:	LDC Account Number:	HST Number:
120 Adelaide Square Toronto, Ontario M7H1J1	Atikokan Hydro Inc. (Lead)		123456779

Type of property or site

Not-for-Profit

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Incentive
\$5,000.00	4.8568	\$4,070.00

Site 1 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Incentives**
\$5,000.00	4.8568	0	\$4,070.00

Estimated Start Date:	Estimated Completion Date:
May 25, 2011	May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

Uploaded Documents

	Document Type
Invoice_3.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data

Actual Financials and Timelines from Post-Project Submission:

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Actual Incentive
\$5,000.00	4.8568	\$4,070.00

Site 1 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Actual Incentives**
\$5,000.00	4.8568	0	\$4,070.00

Actual Start Date:	Actual Completion Date:
May 25, 2011	May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.



Project Details for Site 2: (Location where equipment is to be installed)

Site Address	LDC Name:	LDC Account Number:	HST Number:
33 Hart Abbey Toronto, Ontario M7H2J1	Atikokan Hydro Inc.		123568

Type of property or site

Not-for-Profit

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Incentive
\$6,000.00	40	\$32,000.00

Site 2 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Incentives**
\$6,000.00	40	0	\$32,000.00

Estimated Start Date: Estimated Completion Date:

May 25, 2011

May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

Uploaded Documents

	Document Type
Invoice_5.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data

Actual Financials and Timelines from Post-Project Submission:

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Actual Incentive
\$6,000.00	40	\$32,000.00

Site 2 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Actual Incentives**
\$6,000.00	40	0	\$32,000.00

Actual Start Date: Actual Completion Date:

May 25, 2011

May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures

** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

☒ * I have read and agree to the program [terms and conditions](#).

Approve Application

Reject

Print



The Applicant has 2 options at this point in the **RETROFIT PROGRAM** Application process, both of which are described in the sections below:

Option 1: Submit the **RETROFIT PROGRAM**, Application with the post-project details to the local electric utility for review and approval of the final participant incentive payment based on the summary view of the application.

Option 2: Reject the application so that:

- The Applicant can modify the application and submit to the local electric utility
- The Applicant Representative can make further modifications and re-submit to the Applicant.



15.1.1 Option 1: Approve Application

If the Applicant is satisfied with the summary view of the **RETROFIT PROGRAM** application including the post-project content provided by the Applicant Representative, they can submit to the local electric utility for review and approval of the final participant incentive amount. The process to do this is described below:

- A. Review and ensure that the **RETROFIT PROGRAM** Participant Agreement has been agreed to as indicated by clicking the box as shown in the screen shot below.
- B. Click the '**Approve Application**' button as shown in the below screen shot

Uploaded Documents

	Document Type
Invoice_5.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data

Actual Financials and Timelines from Post-Project Submission:

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)		Estimated Actual Incentive
\$6,000.00	40		\$32,000.00

Site 2 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Actual Incentives**
\$6,000.00	40	0	\$32,000.00

Actual Start Date: May 25, 2011 Actual Completion Date: May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures
** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

A

☒ * I have read and agree to the program [terms and conditions](#).

B

Approve Application

Reject

Print



- C. Once the Applicant has checked the **'Approve Application'** button, the system will do the following:
- Direct the Applicant back to their main user account landing page as shown in the screen shot below.
 - Change the status of the application to **'Post-Project Submission – Submitted to LDC for Approval'**
 - The system will generate an email notification to the local electric utility notifying them of the **RETROFIT PROGRAM** Application submission.

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Status of your Applications

RETROFIT PROGRAM

Name	Status	Last Update	Actions
120 Adelaide, Toronto	Post-Project Submission - Submitted to LDC for Approval	26/05/2011 10:30:27 AM	View

C(ii)



15.1.2 Option 2: Reject Application

If the Applicant is not satisfied with the information provided in the summary view of the **RETROFIT PROGRAM** application provided by the Applicant Representative, they can reject the application. The process to do this is described below:

- A. The Applicant must click the **'Reject'** button as shown in the screen shot below:

Uploaded Documents

	Document Type
Invoice_5.GIF	Retrofit Prescriptive Approach - Cost Estimates, Quotes or Proposals
Quote_1.GIF	Retrofit Prescriptive Approach - Cut Sheets or Detailed Manufacturers Data

Actual Financials and Timelines from Post-Project Submission:

Prescriptive Approach:

Project Cost	Assumed Demand Savings (kW)	Estimated Actual Incentive
\$6,000.00	40	\$32,000.00

Site 2 Summary

Site Project Cost	Assumed Site Demand Savings (kW)	Assumed Site Energy Savings (kWh)*	Site Estimated Actual Incentives**
\$6,000.00	40	0	\$32,000.00

Actual Start Date: May 25, 2011 Actual Completion Date: May 26, 2011

* The Energy Savings (kWh) summary value excludes Prescriptive Measures
** The Total estimated incentives are subject to a cap of 50% of the actual eligible project costs, up to a maximum of 55% of the estimated eligible project costs, as originally approved by your local electric utility.

☒ * I have read and agree to the program [terms and conditions](#).

[Approve Application](#) [Reject](#) [Print](#)

A



- B. Once the **'Reject'** button has been clicked, the system will do the following:
- Direct the Applicant back to their main account landing page as shown in the screen shot below.
 - Change the status of the application to **'Post-Project Submission –Rejected by Participant'** which is visible to both the Applicant and Applicant Representative
 - Allow both the Applicant and Applicant Representative the ability to **'Add Post-Project Submission'**
 - Generate an email notification to the Applicant Representative notifying them that the Applicant has not been approved.

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Bob Brown
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	GET STARTED >>

Status of your Applications

RETROFIT PROGRAM			
Name	Status	Last Update	Actions
120 Adelaide, Toronto	Post-Project Submission - Reject by Participant	26/05/2011 10:19:10 AM	<div>View</div> <div>Add Post-Project Submission</div>

Callout B(ii) points to the Status column.

Callout B(iii) points to the Add Post-Project Submission button.

Once the application has been rejected, there are 2 options as described below:

Option 1: The Applicant can modify the post-project submission and submit to the local electric utility

Option 2: The Applicant Representative can make further modifications and re-submit to the Applicant.



16 Post-Project Submission Approval

Once the local electric utility has reviewed the **RETROFIT PROGRAM** Post-Project Application and completed the necessary post-project site visits, they are ready to provide approval for the final participant incentive amount

An Applicant will know when their **RETROFIT PROGRAM** Post-Project Application has been approved when:

- A. They receive a system generated email notification advising them that the local electric utility has approved the final participant incentive amount
- B. The status of the application on the main page of the Applicant's user account has been changed to **'Post-project Submission – Payment Approved by LDC'** as shown in the screen shot below.

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Account Details

Bob Brown
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Toronto, Ontario M1J3H9
Canada

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	GET STARTED >>

Status of your Applications

RETROFIT PROGRAM			
Name	Status	Last Update	Actions
120 Brock, Toronto	Post-Project Submission - Payment Approved by LDC	25/05/2011 2:32:11 PM	View



17 Final Incentive Payment

Once the Post-Project Submission has been approved, the applicant must submit an invoice, within 90 days following project completion, to their local electric utility. Upon receipt of the invoice for the final participant incentive amount, the local electric utility will issue payment to the Applicant. Please contact your local electric company for further details.



18 Appendix A: Ineligible Document Types

Document file types which cannot be uploaded as part of the **RETROFIT PROGRAM** Application include the following:

.ade	.crt	.its	.mde	.prf	.shtml
.adp	.csh	.jse	.mdt	.prg	.soap
.app	.der	.ksh	.mdw	.printer	.stm
.asa	.dll	.lnk	.mdz	.ps1	.svc
.ashx	.exe	.mad	.msc	.ps1xml	.url
.asmx	.fxp	.maf	.msh	.ps2	.vb
.asp	.gadget	.mag	.msh1	.ps2xml	.vbe
.bas	.grp	.mam	.msh1xml	.psc1	.vbs
.bat	.hlp	.maq	.msh2	.psc2	.ws
.cdx	.hpi	.mar	.msh2xml	.pst	.wsc
.cer	.hta	.mas	.mshxml	.reg	.wsf
.chm	.htr	.mat	.msi	.rem	.wsh
.class	.htw	.mau	.msp	.scf	
.cmd	.ida	.mav	.mst	.scr	
.cnt	.idc	.maw	.ops	.sct	
.com	.idq	.mcf	.pcd	.shb	
.config	.ins	.mda	.pif	.shs	
.cpl	.isp	.mdb	.pl	.shtm	



19 Appendix B: System Generated Email Notifications

The following is a list of the emails which are generated by the system based on the status of the **RETROFIT PROGRAM** Application.

Pre-Project Application- Sent to Applicant for Review

From:

ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** APPLICATION COMPLETION

Content:

Dear **<Applicant Name>**,

Your **saveONenergy RETROFIT PROGRAM** Application has been completed by your Applicant Representative, **<Applicant Representative Name>**, and is ready for you to review and submit.

<Project ID #>

<Site level building address>

Please click here to log into your web account to access the Application and confirm the information provided by your Applicant Representative is accurate.

Once confirmed, please press the submit button on the last page of the Application. Your confirmed and submitted application will be automatically sent for approval to your local electric utility.

If there are revisions required to the Application please click the 'Reject' button and an automatic email notification will be sent to your Applicant Representative.

For more information, please contact your local electric utility.



Pre-Project Application –Submission Rejected by Applicant

From: ceco@powerauthority.on.ca

Subject:

YOUR **saveONenergy RETROFIT PROGRAM** APPLICATION HAS NOT BEEN APPROVED

Content:

Dear **<Applicant Representative Name>**,

The **saveONenergy RETROFIT PROGRAM** Application you completed on behalf of the Applicant, Applicant Name, was not approved by the Applicant.

<Project ID #>

<Site level building address>

Please contact the Applicant to discuss any issues and/or discrepancies that may be the result of this rejection and re-submit the Application accordingly.

Please **<click here>** to log into your web account and access the Application.

For more information, please contact your local electric utility.

Pre-Project Application –submitted to the local electric utility

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** APPLICATION SUBMISSION

Content:

A **saveONenergy RETROFIT PROGRAM** Application has been submitted for your review and approval.

<Applicant Name>

<Applicant Representative Name>

<Project ID #>

<Site level building address>

Please **<click here>** to view the details of the **saveONenergy RETROFIT PROGRAM** Application.



Pre-Project Review - Rejected by the local electric utility – Not Eligible

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** APPLICATION SUBMISSION
NOT ELIGIBLE

Content:

Dear **<Applicant Name>**,

The **saveONenergy RETROFIT PROGRAM** Application you submitted to your local electric utility has not been approved.

<Applicant Representative Name>

<Project ID #>

<Site level building address>

Please contact your local electric utility for details on why this application is not eligible under the **saveONenergy RETROFIT PROGRAM**.

Please **<click here>** to log into your web account to view the Application.

Pre-Project Review - Rejected by local electric utility for Applicant Adjustment

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** PRE-PROJECT APPLICATION
ADJUSTMENT REQUIRED

Content:

Dear **<Applicant Name>**,

The **saveONenergy RETROFIT PROGRAM** Application has been reviewed by your local electric utility and requires an adjustment.

<Applicant Representative Name>

<Project ID #>

<Site level building address>

Please contact your local electric utility for more details on what adjustments to the Application are required.

Please **<click here>** to log into your web account in order to edit the Application and re-submit to your local electric utility for further review.



Pre-Project Review-Adjustments submitted to the local electric utility

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** PRE-PROJECT APPLICATION
ADJUSTMENT SUBMISSION

Content:

saveONenergy RETROFIT PROGRAM Application has been adjusted by the Applicant and re-submitted for your review and approval.

<Applicant Name>

<Applicant Representative Name>

<Project ID #>

<Site level building address>

Please **<click here>** to view the details of the **saveONenergy RETROFIT PROGRAM** Application.

Pre-Project Review – Adjustments Sent to Applicant for Review

From: ceco@powerauthority.on.ca

Subject: NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** APPLICATION
ADJUSTMENT SUBMISSION

Content:

Dear **<Applicant Name>**,

Your **saveONenergy RETROFIT PROGRAM** Application has been adjusted by your Applicant Representative and is ready for your review.

<Applicant Representative Name>

<Project ID#>

<Site Level Building Address>

Please **<click here>** to log into your web account to access the Application and confirm the information provided by your Applicant Representative is accurate.

Once confirmed, please press the submit button on the last page of the Application. Your confirmed and submitted application will be automatically sent for approval to your local electric utility.

If there are revisions required to the Application please click the 'Reject' button and an automatic email notification will be sent to your Applicant Representative telling them they have to contact you for more information.

For more information, please contact your local electric utility. Pre-Project Review – Adjustments Rejected by Applicant



Pre-Project Review – Approved to proceed by the local electric utility

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF saveONenergy RETROFIT APPLICATION APPROVAL

Content:

Dear **<Applicant Name>**,

Your Application for the **saveONenergy RETROFIT PROGRAM** has been approved by your local electric utility.

<Applicant Representative Name>

<Project ID#>

<Site Level Building Address>

Please **<click here>** to view the details of your project approval.

You are now ready to proceed with your project.

For more information, please contact your local electric utility.

Post-Project Submission -Sent to Participant for Review

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF saveONenergy RETROFIT PROGRAM POST-PROJECT APPLICATION COMPLETION

Content:

Dear **<Applicant Name>**,

Your **saveONenergy RETROFIT PROGRAM** Post-Project Submission has been completed by your Applicant Representative, **<Applicant Representative Name>**, and is ready for you to review and submit.

<Project ID #>

<Site level building address>

Please **<click here>** to log into your web account to access the Application and confirm the information provided by your Applicant Representative is accurate.

Once confirmed, please press the submit button on the last page of the Application. Your confirmed and submitted post-project application submission will be automatically sent for approval to your local electric utility.

If there are revisions required to the Application please click the 'Reject' button and an automatic email notification will be sent to your Applicant Representative.

For more information, please contact your local electric utility.



Post-Project Submission - Rejected by Participant

From: ceco@powerauthority.on.ca

Subject:

YOUR **saveONenergy RETROFIT PROGRAM** POST-PROJECT APPLICATION HAS NOT BEEN APPROVED

Content:

Dear **<Applicant Representative Name>**,

The **saveONenergy RETROFIT PROGRAM** Post-Project Submission you completed on behalf of the Applicant has not been approved by the Applicant.

<Applicant Name>

<Project ID#>

<Site Level Building Address>

Please contact the Applicant to discuss any issues and/or discrepancies that may be the result of this rejection and re-submit the Application accordingly.

Please **<click here>** to log into your web account and access the Application.

For more information, please contact your local electric utility.

Post-Project Submission - Submitted to the local electric utility for Approval

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF SUBMITTED EVIDENCE FOR **saveONenergy RETROFIT PROGRAM** INCENTIVE

Content:

A Post-Project Submission completed under the **saveONenergy RETROFIT PROGRAM** has been submitted.

<Applicant Name>

<Applicant Representative Name>

<Project ID #>

<Site level building address>

Please **<click here>** to view the submitted documentation.



Post-Project Submission – Rejected by the local electric utility for Participant Adjustments

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** POST-PROJECT APPLICATION ADJUSTMENT SUBMISSION

Content:

Dear **<Applicant Name>**,

The **saveONenergy RETROFIT PROGRAM** Post-Project Submission has been reviewed by your local electric utility and requires an adjustment.

<Applicant Representative Name>

<Project ID #>

<Site Level Business Address>

Please contact your local electric utility for more details on what adjustments to the Application are required.

Please **<click here>** to log into your web account in order to edit the Application and re-submit to your local electric utility for further review.



Post-Project Submission – Adjustments sent to Participant for Review

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** APPLICATION ADJUSTMENT SUBMISSION

Content:

Dear <Applicant Name>,

Your **saveONenergy RETROFIT PROGRAM** Pre-Project Application has been adjusted by your Applicant Representative, **<Applicant Representative Name>**, and is ready for your review.

<Project ID>

<Site Level Building Address>

Please **<click here>** to log into your web account to access the Application and confirm the information provided by your Applicant Representative is accurate.

Once confirmed, please press the submit button on the last page of the Application. Your confirmed and submitted Application will be automatically sent for approval to your local electric utility.

If there are revisions required to the Application please click the 'Reject' button and an automatic email notification will be sent to your Applicant Representative telling them they have to contact you for more information.

Post-Project Submission – Adjustments Rejected by Participant

From: ceco@powerauthority.on.ca

Subject:

YOUR **saveONenergy RETROFIT PROGRAM** POST-PROJECT APPLICATION ADJUSTMENT HAS NOT BEEN APPROVED

Content:

Dear **<Applicant Representative Name>**,

The **saveONenergy RETROFIT PROGRAM** Post-Project Application you completed on behalf of the Applicant was not approved by the Applicant.

<Applicant Name>

<Project ID #>

<Site level Building address>

Please contact the Applicant to discuss any issues and/or discrepancies that may be the result of this rejection and re-submit the Application accordingly.

Please **<click here>** to log into your web account to access the Application.



Post-Project Submission -Adjustments submitted to the local electric utility for approval

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** POST-PROJECT APPLICATION ADJUSTMENT SUBMISSION

Content:

A **saveONenergy RETROFIT PROGRAM** Post-Project Application has been adjusted by the Applicant and re-submitted for your review and approval.

<Applicant Name>

<Applicant Representative Name>

<Project ID#>

<Site Level Building Address>

Please **<click here>** to view the details of the **saveONenergy RETROFIT PROGRAM** Application.

Post-Project Submission -Payment Approved by the local electric utility

From: ceco@powerauthority.on.ca

Subject:

NOTIFICATION OF **saveONenergy RETROFIT PROGRAM** INCENTIVE APPROVAL

Content:

Dear **<Applicant Name>**,

Your incentive claim for your **saveONenergy RETROFIT PROGRAM** Application has been approved by your local electric utility.

<Applicant Representative Name>

<Project ID#>

<Site Level Building Address>

For more information, please contact your local electric utility.



Post-Project Submission -Payment Denied by the local electric utility

From: ceco@powerauthority.on.ca

Subject:

YOUR **saveONenergy RETROFIT PROGRAM** INCENTIVE HAS NOT BEEN APPROVED

Content:

Dear **<Applicant Name>**,

Your incentive claim for your **saveONenergy RETROFIT PROGRAM** Application has not been approved by your local electric utility.

<Applicant Representative Name>

<Project ID#>

<Site Level Building Address>

For more information, please contact your local electric utility.



20 Appendix C: Online RETROFIT Application Checklist (v1.0)

The following is a list of the information and supporting documentation required to complete an application for the **RETROFIT PROGRAM** via saveonenergy.ca. Understanding what needs to be included as part of your **RETROFIT PROGRAM** application will help your local electric company expedite the pre-approval process. Please see earlier chapters in this manual for detailed information on how to complete the following information. This checklist is also available separately on the **saveONEnergy** website.

CREATING A USER ACCOUNT	✓
▪ Company name (full legal name)	
▪ Company website	
▪ Applicant's contact details (phone number, address, postal code)	
▪ Active email account	
▪ Password (must be at least 8 characters long, contain at least one number and one capital letter)	
APPLICANT REPRESENTATIVE (OPTIONAL)	✓
▪ Email address for Applicant Representative who has already set up a User Account on saveonenergy.ca <i>Note: An Applicant may assign an Applicant Representative to complete the RETROFIT Application on their behalf. An Applicant Representative could be someone internal to the Applicant's company, or someone external such as a contractor or project manager.</i>	
SITE DETAILS	✓
▪ Address of the project location	
▪ HST registrant #	
▪ Hydro account #	
▪ Approximate year the building was built	
▪ Approximate total facility area (sq. ft.) of retrofitted area	
▪ Total number of floors	
▪ Type of existing cooling system (e.g. split system unitary AC, absorption cooling system)	
▪ Type of heating systems (boiler, furnace)	
▪ Estimated project start date & estimated project completion date	
▪ Other comments (for example, special site requirements or conditions which Project Evaluator should be aware of)	



TENANT EDUCATION INCENTIVE (OPTIONAL)	✓
<ul style="list-style-type: none"> ▪ Tenant education proposal 	
PRESCRIPTIVE PROJECTS	✓
Project Information:	
<ul style="list-style-type: none"> ▪ Estimated prescriptive project cost including the following eligible cost: <ul style="list-style-type: none"> ○ Equipment cost 	
Supporting Documentation:	
<ul style="list-style-type: none"> ▪ Manufacturer technical specification sheet(s) 	
<ul style="list-style-type: none"> ▪ Equipment cost estimates, quotes, proposals, or invoices 	
<ul style="list-style-type: none"> ▪ Completed prescriptive worksheets with additional information such as manufacturer and model numbers 	
ENGINEERED PROJECTS	✓
Project Information:	
<ul style="list-style-type: none"> ▪ Estimated engineered project cost including the following Eligible Costs: <ul style="list-style-type: none"> ○ Equipment cost ○ Labour costs for the installation of the equipment ○ Disposal/decommissioning costs of the replaced equipment ○ Inspection costs of the project as may be required pursuant to Laws and Regulations 	
Supporting Documentation:	
<ul style="list-style-type: none"> ▪ Manufacturer technical specification sheet(s) 	
<ul style="list-style-type: none"> ▪ Equipment cost estimates, quotes, proposals, or invoices 	
<ul style="list-style-type: none"> ▪ Completed Engineered Worksheet(s) 	



CUSTOM PROJECTS	✓
Project Information:	
<ul style="list-style-type: none"> Estimated Custom Project Cost including the following Eligible Costs: <ul style="list-style-type: none"> Equipment cost Labour costs for the installation of the equipment Disposal/decommissioning costs of the replaced equipment Inspection costs of the project as may be required pursuant to Laws and Regulations Costs of design, engineering and/or architecture associated with the project Project management costs provided by third parties Costs to deliver the equipment Costs to prepare and implement the Project Measurement & Verification Plan or costs to assist the LDC in preparing supporting documentation 	
<ul style="list-style-type: none"> Brief project description for both the base case (existing equipment) and the energy efficient case (proposed equipment) 	
Supporting Documentation:	
<ul style="list-style-type: none"> Manufacturer technical specification sheet(s) 	
<ul style="list-style-type: none"> Equipment cost estimates, quotes, proposals, or invoices 	
<ul style="list-style-type: none"> Supporting calculations for energy (kWh) and demand (kW) savings 	
<ul style="list-style-type: none"> Custom Project Measurement & Verification Plan (required for projects with estimated incentive amounts > \$10,000) 	

Following completion of your retrofit project, the following information and supporting documentation is required to complete the Post-Project Submission via the **saveONenergy** website.

POST-PROJECT SUBMISSION	✓
Project Information:	
<ul style="list-style-type: none"> Actual project start date & actual project completion date 	
Supporting Documentation:	
<ul style="list-style-type: none"> Invoices to support final project cost 	



saveONenergy^{OM} RETROFIT PROGRAM

To learn more contact your local electric utility.

