COMPLETING AN ONLINE APPLICATION AT SAVEONENERGY.CA BUSINESS RETROFIT PROGRAM

How to complete a basic application for your retrofit

If you have registered at www.saveonenergy.ca you can take the next step to create an application. The scope of this document is to summarize a simple prescriptive lighting retrofit application. A prescriptive application is for those who are retrofitting the most common energy saving measures. These might include changing out old lights, right sizing motors, or installing an energy efficient air conditioner.

Tip: Download the appropriate worksheet related to your retrofit and complete it. Ensure that you provide the manufacturer name and model number. The most common error on the lighting worksheet is that only the fixtures are identified. The ballast and lamp information is what is required to meet the OPA guidelines. Save the worksheet and then it can be uploading during the application process. All worksheets are available on the saveonenergy.ca website.

It's important to note that applications can be saved as a draft while you are waiting for more information. The location of the "save and return at a later date" icon is in the upper right quadrant of each screen.

Prior to starting your application you will need the following information:

- Your Veridian Connections account number
- Your HST number
- The model and manufacturer of your new equipment
- Scanned or soft copies of your new equipment specs
- The street address of the retrofit building

Tip: You will need to be registered at the www.saveOnenergy.ca website. Straightforward instructions are available from Veridian Connections.

Go to the website www.saveonenergy.ca

Click on Business

On the left side of the screen there are several options in green text. Click on Retrofit Program (third from the top).

The next screen provides a summary of all of the retrofit programs available and the details of the incentives. If you know you are doing a basic prescriptive application go to the bottom of the page and click "Get Started"

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The first screen asks you to enter your postal code. Ensure that the postal code is for the building that is being retrofitted. If Veridian Connections is your hydro company click "yes, this is my utility company". This action will populate all of the application pages with the Veridian Connections logo.

Now you are asked to log in. Using the information from your registration, type in your email and password and click Login.

Note that there are four sections that need to be completed by contractors/suppliers and consultants. Business owners who are completing their own applications have only three sections to complete. The four sections are:

1. Authorization – where you identify how you are related to the retrofit
2. Third Party Contributions, Contacts, and Representatives – only completed if you are a supplier/contractor/consultant for the Veridian customer completing a retrofit
3. Site and Project Details – information about the building where the retrofit is to take place
4. Confirm and Submit – the opportunity to review the application

STEP 1. The first section is the Authorization page. There are two distinct groups who will be filling out these applications. Most of you will be doing an application for your own business. Others will be completing these applications as an "Applicant Representative". Usually it's contractors or suppliers that fall into the latter group. Applicant representatives complete the application on behalf of their Veridian customer as part of their services to their client in addition to the retrofit work.

The first section for all applicants (owner and third party) to complete is the authorization section. The authorization identifies your relationship to the retrofit building and who is completing the application.

<u>**If you are a customer and are completing your own application you need to fill this section in as follows:**</u>

Yes, I am the building owner or legally authorized to act for the building owner (even if you are leasing space from the owner)

And

No, you will not be assigning an Applicant Representative to complete the Application form on your behalf.

Click next. You will be directed to the Site and Project details page. Skip ahead to **STEP 3**.

<u>**If you are a supplier or contractor or consultant and you are applying on behalf of your customer you need to fill this section in as follow:**</u>

No, I am not the building owner or legally authorized to act for the building owner.

And

Yes, you do have written authorization from the building owner/manager to perform the work associated with a project.

Click next

STEP 2. Contractors/Suppliers/Consultant will then be directed to the next section "Third Party Contributions, Contracts, and Representative." The first question on the page is related to any other financial incentives that have been received related to the retrofit. This must be reported and this dollar amount will be excluded from the eligible cost for the retrofit. The Applicant Representative now completes this page as it relates to their customer.

Enter the customer's legal name.

Enter the customer's website if applicable. It is not mandatory

Pick the customer's title from the drop down menu

Type in their first name

Type in their last name

Type in their phone number

Type in alternate phone number if applicable

Type in fax number if applicable

Type in the customer's email address. Note that the accuracy of this address is critical. It's the way in which all OPA correspondence is completed.

The customer address section is unique in that the page is set up so that each line has just one word that you need to provide. The address section is broken up like this:

Address line 1: 123 Main

Street type: Street (from the drop down menu)

Street direction: North (from the drop down menu)

Unit/Suite/Apt: 201

City: Somewhere out there

Country: Canada (from the drop down menu)

Type in customer's postal code

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Click next

The next step is to identify yourself as the third party contact by completing the Application Representative Identification.

Type in your email address

Pick your title from the drop down menu

Type in your first name

Type in your last name

Type in your phone number

Type in alternate phone number if applicable

Type in fax number if applicable

The address section is unique in that the page is set up so that each line has just one word that you need to provide. The address section is broken up like this:

Address line 1: 123 Main

Street type: Street (from the drop down menu)

Street direction: North (from the drop down menu)

Unit/Suite/Apt: 201

Type in your City

Type in your Province

Type in your postal code

Type in your company name

Click next

STEP 3. This is the part of the application that summarizes the building where the retrofit is to take place.

Type in the building name if applicable. Note: If the building does not have a name use the name of the Applicant.

The address section is unique in that the page is set up so that each line has just one word that you need to provide. The address section is broken up like this:

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Address line 1: 123 Main

Street type: Street (from the drop down menu)

Street direction: North (from the drop down menu)

Unit/Suite/Apt: 201

Type in the City

Type in the Province

Type in the postal code

Type in the HST number. Note: This is a mandatory field.

Type in the LDC Account number. This is the customer account number on your Veridian invoice.

Check if owner or tenant

Check the type of building.

The next section has several mandatory fields. You can estimate if you are not certain of the details.

Type in the date the building was built.

Type in the estimated square footage of the area you are retrofitting. Alternatively you can identify the square footage of the entire building.

Type in the type of cooling system at the retrofit location

Type in the type of heating at the retrofit location

The next two lines are not mandatory. If you have the information type in the estimated annual consumption in kW.

Type in the peak demand in kW.

Using the calendar, click on the estimated project start date.

Using the calendar, click on the estimated project completion date.

Type in the estimate project cost. Remember to include all costs associated with the project, not just the material.

Click next.

Using the drop down list, identify why you are doing this retrofit.

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Using the drop down list, identify which type of retrofit you are completing

Click on Prescriptive to identify the approach you plan to use.

Click next

On the Prescriptive Approach Details page you are going to identify what measures you plan to do during the retrofit. If you have completed your prescriptive worksheet you do not need to pick one of the supporting documents listed.

Using the drop down menu identify your first measure

Type in the quantity

Click add

Continue adding until you have identified all of the measures you plan to complete

You will see that the Estimated Participant Incentive Amount calculates each item you add.

In the Supporting Documentation section you need to download as much information related to the project as possible.

For the Prescriptive Worksheets and Eligible Project Cost Details download your Prescriptive worksheet, any quotes, and any other details that might explain your project.

On the next line download any specs or descriptions of the products you plan to have installed.

Click next.

If you are retrofitting several locations click on "add another building" and complete the building summary form for each location.

Click next.

STEP 4. This is your opportunity to review your application and make any changes.

After you are satisfied that your application correctly details your project you are ready to submit the application.

Read the terms and conditions of the Retrofit Participant Agreement and click the box if you agree.

Click Submit.

Your application is now ready for assessment.