

PROCESS OVERVIEW FOR

# saveONenergy Retrofit Program<sup>SM</sup> Applications

These are the required steps to apply for financial incentives under the **Retrofit Program**. Use the handy checklist on the inside to make the process as efficient as possible.

## TORONTO HYDRO

- Review Application and pre-approve/inform customer of missing information
- Pre-project site visit by Toronto Hydro
- Post-project site visit by Toronto Hydro
- Compile and review project documentation and information before submitting to Independent Electricity System Operator (IESO)
- Participant incentive payment

Pre-Project Application Submission

**PHASE ONE**  
INITIALIZE

Pre-Project Approval

**PHASE TWO**  
IMPLEMENTATION

Post-Project Application Submission

**PHASE THREE**  
SETTLEMENT

Participant Incentive Cheque Issued

## APPLICANT

- Detailed design
- Equipment pre-ordering\*
- Finalize Application by submitting missing information
- Start construction
- Gather data for measurement and verification (M & V) reporting (if required)
- Gather invoices, specification sheets and evidence of disposal
- Provide Toronto Hydro with any data/documents they request

\*Toronto Hydro assumes no liability for any costs incurred if the **Retrofit Program** Application is ultimately rejected. If construction or procurement for labour starts prior to Application pre-approval, the incentives will be forfeited.



# RETROFIT PROGRAM

## Application Checklist

This checklist will help guide you through the **Retrofit Program** application process. Please complete all steps to ensure a successful application.

**STEP 1:** Start with Application details and then follow the appropriate stream for your project.

**STEP 2:** Complete the appropriate checklist for your project.

Application Details		
NO.	ITEM	YES
1	Applicant saveON energy profile set up	
2	Applicant has agreed to online terms and conditions	
3	Toronto Hydro account number provided	
4	Application meets minimum rebate requirements (Prescriptive—\$100; Custom—1 kW and 2,000 kWh)	
5	Estimated start/end dates are reasonable (Work must not start prior to pre-approval)	
6	Tenant Education Plan provided (if applicable)	
7	Application submitted	

Prescriptive / for equipment on a pre-defined list with per unit incentives		
NO.	ITEM	YES
P1	Fixture quantity accurately input on worksheet	
P2	Full model numbers input on worksheet (e.g. T8 Lighting requires lamp/ballast)	
P3	Fixtures meet worksheet requirements (e.g. CEE, energy star, etc.)	
P4	Prescriptive Worksheet uploaded	
P5	Use Prescriptive Worksheet outputs to complete online incentive fields within Application	
P6	Manufacturer specification sheets uploaded	
P7	Online project cost is accurate (includes material only, tax excluded)	
P8	Ensure cost quotations are uploaded (e.g. contractor/supplier quote)	
P9	Quotes, quantities and fixture types support Prescriptive Worksheet	
P10	Online project cost supports submitted quote	

Custom / for more complex solutions not covered under prescriptive track		
NO.	ITEM	YES
C1	Custom worksheet successfully completed	
C2	Use Custom Worksheet outputs to complete online incentive fields within Application	
C3	Custom Worksheet uploaded	
C4	Manufacturer specification sheets uploaded	
C5	Online project cost is accurate (material and labour, tax excluded)	
C6	Ensure cost quotations are uploaded (e.g. contractor/supplier quote)	
C7	Quotes, quantities and measure types support Custom Worksheet	
C8	Online project cost supports submitted quote	
C9	M&V plan for projects where estimated Application Incentive is greater than \$10,000	
C10	M&V Plan meets IESO protocol	
C11	M&V supporting calculations provided	
C12	Proper discounts applied (e.g. BAS—25%)	
C13	The engineered worksheet can be used as a tool for calculating the savings	



# RETROFIT PROGRAM

## Post-Project Submission Checklist

**STEP 3:** Upon project completion, follow the measures approach checklist appropriate to your project below to ensure the required documentation is complete.

Prescriptive		
NO.	ITEM	YES
P1-P	Ensure online cost is accurate (material only, tax excluded)	
P2-P	Cost pertaining to project needs to be itemized on the invoice (must include separate breakdown—labour and material)	
P3-P	Prescriptive measure online quantities have been adjusted to reflect actual quantities installed if different from original approved quantity	
P4-P	Material invoices have been uploaded (depending on the invoice layout, may require separate breakdown containing material cost OR email confirmation from Applicant that costs reflect only material)	
P5-P	Post-project Prescriptive Worksheet containing actual measures and quantities installed has been uploaded Note—values must match online quantities	
P6-P	Specification sheets for any additional material used which was not submitted during approval process have been uploaded (materials must still be CEE listed/ENERGY STAR related for specific measures as per Prescriptive Worksheet)	
P7-P	Evidence of disposal of old equipment has been uploaded (may come in the form of invoices, recycling certificates, or disposal attestation letter from the applicant)	




Custom		
NO.	ITEM	YES
C1-P	Project cost is subtotal of all applicable project costs (material/labour/assessment/disposal, etc.)	
C2-P	Cost entered in 'Custom approach actual project cost' is the total of all supporting invoices	
C3-P	Applicable invoices have been uploaded (labour, installation, assessment, disposal, and material, etc.)	
C4-P	Specification sheets of any additional materials used which were not submitted during approval process have been uploaded	
C5-P	Custom worksheet has been uploaded—original document if no changes, revised document if scope of work has changed. Engineered worksheet tool is used for calculations	
C6-P	If scope of work has changed, updated energy savings and demand savings have been entered online by clicking on the <b>'Edit'</b> hyperlink in the respective list of documents Note—Applicant/AR must click the <b>'Save &amp; Add'</b> before submitting revised Custom savings	
C7-P	Post M&V plan has been uploaded, if applicable	
C8-P	Evidence of disposal of old equipment has been uploaded (may come in the form of invoices, recycling certificates, or disposal attestation letter from the applicant)	

# Toronto Hydro Incentive Programs

Toronto Hydro offers **saveONenergy**<sup>OM</sup> programs that provide financial incentives and technical assistance to help improve your energy efficiency. With programs available for commercial, institutional, multi-residential and industrial buildings, conservation can be an attractive investment opportunity with excellent returns. Discover your best energy-saving opportunities by starting with an energy audit and then apply for the appropriate incentive programs for further funding.

Visit [torontohydro.com/business](https://torontohydro.com/business)  
for more information or to apply online for **saveONenergy**<sup>OM</sup> programs.

**Or contact us today at:**

-  416-542-3388
-  [cdm@torontohydro.com](mailto:cdm@torontohydro.com)
-  [Torontohydro.com/ProgramUpdates](https://torontohydro.com/ProgramUpdates)

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