



ENERGY SAVINGS FOR BUSINESS

Investing to keep businesses competitive



ESB Online Application Instructions

April 23, 2021



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1. Introduction & Purpose

Energy Savings for Business Program uses a Program Portal, available at ESBProgram.ca, to deliver the program efficiently and effectively. Once logged in to the portal, Participants or Eligible Contractors (among others) create, submit and/or receive an Application, receive the Pre-Approval Notice/Application Rejection, Application Summary, Participant Terms and Conditions, agreement forms, and Post-Project Application and Project Completion Documentation. The Portal is compatible with multiple devices: desktops, tablets and smartphones. It is also supported on multiple browsers: Explorer, Chrome, Edge, Safari, Mozilla & others.

The purpose of the Application Guide (the Guide) is to provide a step-by-step guide for use by Participants and Eligible Contractors to register as Program participants, and to submit a Project Incentive Application in the Portal. As such, the Guide is not intended to provide details around Program rules or the Eligible Measures List. For details on Program rules or the Eligible Measures List, please visit the Program Portal, www.ESBProgram.ca, and refer to the following documents:

- Participant Terms & Conditions
- Contractor Code of Conduct
- Eligible Measures List

Please note that the Participant Terms and Conditions, Contractor Code of Conduct and Eligible Measures List shall control and supersede any inconsistencies, conflicts, or ambiguities within the Application Guide.

If you are unable to find an answer to your question in the Application Guide or require additional assistance, please contact the Program's dedicated contact centre, open Monday to Friday from 9 a.m. to 5 p.m. We are happy to help.

Email: support@esbprogram.ca

Chat: via eralberta.ca/esb

Toll-free: 844-407-0025

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2. Registering as an Eligible Contractor

A contractor will need to register to become an Eligible Contractor for the Program. Once a contractor’s registration is approved by the Program team, a Participant will be able to select the Eligible Contractor from a drop-down menu in the Portal, during the pre-project application creation and submission phase.

To register as an Eligible Contractor in the Portal, please complete the following steps:



Registration Tip: having access to the information in the table below will help speed up the registration process.

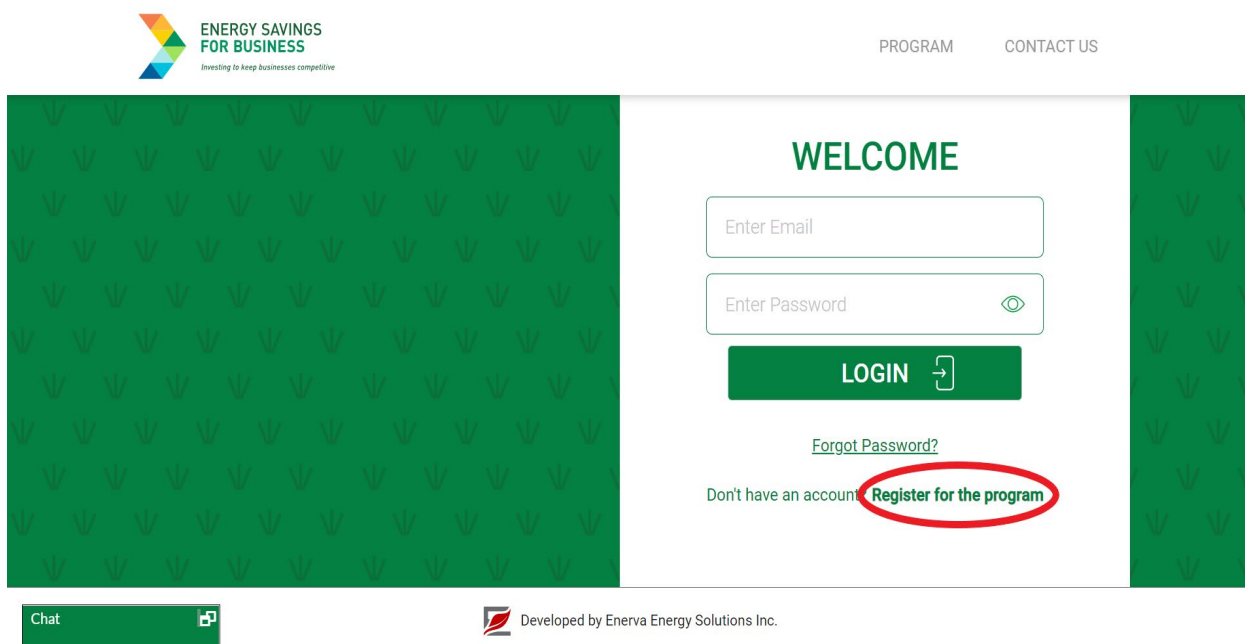
Required Information for Registration	Notes
Contact details of authorised person registering the contractor’s company	<ul style="list-style-type: none"> • First name, last name, • Email, phone number, • Your role in the organisation. <p>*Note that the contractor registering should be authorised to agree to the Program Portal (“Dolphin”) Terms of Use and three checkboxes for consent for collection and usage of information and communication</p>
Company details	<ul style="list-style-type: none"> • Legal name of business, • Company address, • Technology focus of the company, • Markets or regions served, • Your role in the supply chain
Agree to the Contractor Code of Conduct (called Code of Conduct in the Program Portal)	<ul style="list-style-type: none"> • In the Portal, you will be required to agree to the Contractor Code of Conduct in order to complete your registration.
Additional requirements	<ul style="list-style-type: none"> • Confirm WCB and Insurance Requirements (as applicable)
For PV Systems	<ul style="list-style-type: none"> • Confirm membership with ECA, CanREA or SESA
For Geothermal Systems	<ul style="list-style-type: none"> • Confirm Certified Geo Exchange Designer (CGD) • Confirm Professional Engineer Designation

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2.1 Register



Step 1: Visit www.ESBProgram.ca and click 'Register for the program'.



This will take you to 'REGISTER NOW TO PARTICIPATE IN ENERGY SAVINGS FOR BUSINESS PROGRAM' page where you will create an account.

[Click here to navigate back to table of contents](#)

2.2 Create Account



Step 2: Manually fill in the required information in the white cells:

- Create a password that passes the security requirements
- Once you enter your address in the 'Company Address field', the Postal Code, City and Province fields in the grey cells should auto populate.
 - If the postal code information is incorrect, please insert manually.

The green cells contain a drop-down list:

- From the 'Account Category' drop-down list, select 'I am a contractor'.
- Select the appropriate field from the 'How did you hear about the program' drop-down list.

Review the terms and policies by clicking the link or the dropdown arrow on the right. To complete your registration, you must first agree to the Portal's Terms of Use, confirm information you have provided is not personal information, agree to the uses of Eligible Contractor information, and consent to being contacted by the Program.

Application Tip: *The Company Name provided should be the legal name by which the company is registered to conduct its business. The legal name of the company will be used for execution of the registration, terms of the Contractor Code of Conduct and for application of program rules. Additionally, if the Participant assigns the incentive to the Contractor at the payment stage of the application process, the name provided will be used for the payment.*

[Click here to navigate back to table of contents](#)

Step 3: Click 'COMPLETE REGISTRATION' at the bottom of the page.

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PROGRAM CONTACT US

< Cancel Registration

REGISTER NOW TO PARTICIPATE IN ENERGY SAVINGS FOR BUSINESS PROGRAM

First Name

Last Name

Business Mobile Number

Email

Enter Password
 ✓ This password passes the requirements

Confirm Password

Account Category

How did you hear about the program?

Company Name

Company Website

Company Address

Address Line 2

Postal Code

City

Province

I agree to the Program Portal("Dolphin") Terms of Use

I agree that the information ("Eligible Contractor Information") submitted in this sign-up form and in other communications and forms as part of the Program consists solely of business or commercial information and is not personal information of any individual.

I agree to the Uses of Eligible Contractor Information

I consent to being contacted by ERA or Enerva by e-mail, text or other electronic means for program-related matters or about other energy efficiency and greenhouse gas reducing technologies, products and services that ERA or Enerva offers.

COMPLETE REGISTRATION

Developed by Enerva Energy Solutions Inc.

Application Tip: You will not be able to click on 'COMPLETE REGISTRATION' and proceed to the next step until you have filled in the required information and agreed to terms and policies. An error message will highlight fields with invalid entries that must be corrected before you can proceed.

[Click here to navigate back to table of contents](#)

Step 4: The next step is to click 'CREATE ACCOUNT'

CREATE ACCOUNT?

You are about to create an account for **USER1 100029292 Alberta Ltd.** as a contractor.

[CREATE ACCOUNT](#)

CANCEL ACCOUNT CREATION

Application Tip: If you need to change any information before creating an account, click 'CANCEL ACCOUNT CREATION' and you will be taken back to the prior screen. Changes can be made as required. No information will be saved until an account is created.

2.3 Email Verification



Step 5: Once you click 'CREATE ACCOUNT', the following message will be displayed, and you will need to click on the 'CONFIRM EMAIL ID' verification link sent via email to access your account page.

VERIFICATION EMAIL SENT TO YOUR EMAIL ID!

Please visit your email inbox and **click on the verification link** to access your account page.

If you haven't received the email in your primary inbox, please check your spam and promotions folders.

Did not receive the verification email?

RE-SEND EMAIL

LOG OUT

Application Tip: If you do not receive an email with the verification link, please check your Spam/Junk folders. If you still can not find the email, click on 'RE-SEND EMAIL' and try again. You can also always contact the Program's contact centre to help troubleshoot any issues.

[Click here to navigate back to table of contents](#)

Once you click on the verification link 'CONFIRM EMAIL ID' in your email, you will be automatically re-directed to the Contractor profile page.

Subject: Verify Email ID | Energy Savings for Business



ENERGY SAVINGS FOR BUSINESS

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Hello User1,

Thank you for signing up for Emissions Reduction Alberta's Energy Savings for Business (ESB) Program.

Please confirm your email ID by clicking the link below.

We may need to send you critical information about the ESB Program and your applications and it is important that we have an accurate email address.

[CONFIRM EMAIL ID](#)

If you would like to get in touch with us, reach out to our support team via email at support@esbprogram.ca.

Thanks,
ESB Program Support



Do not wish to receive emails? [Unsubscribe](#)

[Click here to navigate back to table of contents](#)

2.4 Complete Contractor Profile



Step 6: The Contractor profile page provides a summary of the information used to create your account. You are now required to fill in additional information to become an Eligible Contractor.

Welcome, User1

Your profile is incomplete. Click on **Complete Details** below to complete your profile and become eligible as a Contractor under the Energy Savings for Business program.

Account Overview | Contractor

<p>Company Name: USER1 100029292 Alberta Ltd.</p> <p>Contractor ID: CON-1097</p> <p>Contact Name: User1 User1</p> <p>Phone Number: 19029039033</p> <p>Email ID: dimine8346@wedbo.net</p>	<p>Address: Calgary Calgary, Alberta T1X 8H7</p> <p>Change Password</p> <p>Complete Details</p>
--	---

To complete your profile, click 'COMPLETE DETAILS'.

The page below appears, and Account and Company Details can be edited anytime if required.

Application Tip: Once your profile is complete, the color on the screen will change to blue.

[Click here to navigate back to table of contents](#)

< Back

COMPLETE PROFILE AND SUBMIT FOR REGISTRATION

1
2
3
4

Account Details
Company Details
Code of Conduct
License Requirements

<p>First Name <input style="width: 90%;" type="text" value="User1"/></p> <p>Last Name <input style="width: 90%;" type="text" value="User1"/></p> <p>Business Mobile Number <input style="width: 90%;" type="text" value="🇨🇦 +1 (902) 903-9033"/></p> <p>Work Number(Optional) <input style="width: 90%;" type="text" value="🇨🇦 +1"/></p> <p>Extension(Optional) <input style="width: 90%;" type="text" value="XX - XXX"/></p> <p>Email <input style="width: 90%;" type="text" value="dimine8346@wedbo.net"/></p> <p>Account Category <input style="width: 90%;" type="text" value="I am a contractor"/></p>	<p>Company Name <input style="width: 90%;" type="text" value="USER1 100029292 Alberta Ltd."/></p> <p>Company Website <input style="width: 90%;" type="text" value="www.user1.com"/></p> <p>Company Address <input style="border: 1px solid red; border-radius: 5px;" type="text" value="Calgary, AB, Canada"/></p> <p>Address Line 2 <input style="width: 90%;" type="text" value="Company HQ Address Line 2"/></p> <p>Postal Code <input style="border: 1px solid #ccc;" type="text" value="T1X 8H7"/></p> <p>City <input style="border: 1px solid #ccc;" type="text" value="Calgary"/></p> <p>Province <input style="border: 1px solid #ccc;" type="text" value="Alberta"/></p>
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Developed by Enerva Energy Solutions Inc.

Step 7: Once changes have been made, click ‘SAVE & PROCEED’ to continue.

Application Tip: An error message will highlight fields with invalid entries that must be corrected before you can proceed. You will only be able to click ‘SAVE AND PROCEED’ once all fields have been filled in.

[Click here to navigate back to table of contents](#)

Step 8: On this page you will be required to fill out appropriate descriptions for your company, role, etc., then click 'SAVE AND PROCEED' to continue.

< Back

COMPLETE PROFILE AND SUBMIT FOR REGISTRATION

1 ————— 2 ————— 3 ————— 4

Account Details Company Details Code of Conduct License Requirements

Role in Company

Administrative Support Design Sales Field Technician (Installation, Support)

Other

Role in Supply Chain

Select all that apply

Technology Focus for Company

Select all that apply

Markets Served by Company

Select all that apply

Regions of Operation

Select all that apply

SAVE AND PROCEED

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Application Tips:

- Multiple options can be selected from the drop-down menus.
- An error message will highlight fields with invalid entries that must be corrected before you can proceed. You will only be able to click 'SAVE AND PROCEED' once all fields have been filled in.

[Click here to navigate back to table of contents](#)

Step 9: On this page, you will be required to review and agree to the Contractor Code of Conduct and then click 'SAVE AND PROCEED'.

< Back

COMPLETE PROFILE AND SUBMIT FOR REGISTRATION

1 Account Details 2 Company Details 3 Code of Conduct 4 License Requirements

Contractor Code of Conduct

INTRODUCTION

Emissions Reduction Alberta (ERA) has launched an incentive-based Program called [Energy Savings for Business](#) (ESB). The ESB program is designed to enable the installation of energy efficient products and on-site generation in commercial and industrial facilities and other types of businesses. The Program offers financial incentives to lower the cost of eligible Measures, encouraging participants to upgrade systems to save energy and reduce emissions. The ESB Program is a prescriptive program, meaning that the incentive levels are pre-defined for each type of eligible Measure on a per unit basis. The incentives are specified within the Measure List as published on the ESB website.

Eligible Contractors play a central role in the Program. Eligible Contractors are encouraged to inform their customers about the Program and help them complete the necessary

PROGRAM PARTICIPATION REQUIREMENTS.

For a Product and Service Provider to participate in the Program, they must register with ERA to become an Eligible Contractor. The process is simple:

1. Enter your contact information through the Program Application Portal available on the website.

I have read the above agreement and agree to the terms & conditions.

SAVE AND PROCEED

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Step 10: To complete your profile, read and answer the questions under the License Requirements. Then click 'SAVE AND SUBMIT' to continue.

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COMPLETE PROFILE AND SUBMIT FOR REGISTRATION

1 Account Details 2 Company Details 3 Code of Conduct 4 License Requirements

Do you meet the Insurance Requirements specified in the Code of Conduct? Yes

Do you meet the WCB Requirements specified in the Code of Conduct? Yes

Are you registered for GST? Yes

Do you have the required Licences and Certifications specified in the Code of Conduct? Yes

Are you a Member of SESA? Yes

Are you a Member of CanREA? Yes

Have your Ground Source Heat Pump installers completed the Accredited Installer course from the International Ground Source Heat Pump Association or equivalent? Yes

SAVE AND SUBMIT

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Application Tips:

- *Solar PV membership and GSHP questions appear only if Solar and Geothermal are selected as technologies under Company Details.*
- *'SAVE AND SUBMIT' will be activated once all fields have been selected.*

[Click here to navigate back to table of contents](#)

2.5 Submit for Registration



Step 11: If satisfied with your details provided click 'SUBMIT PROFILE', otherwise, click 'GO BACK & REVIEW DETAILS' to edit and update if necessary.

SUBMIT FOR REGISTRATION

You are about to submit your profile for registration as a contractor.

Your profile will be reviewed by the ESB Program team and will have to be approved for you to be able to participate in the Energy Savings for Business Program.

Please confirm that the details you have submitted are accurate.

[SUBMIT PROFILE](#)

[GO BACK & REVIEW DETAILS](#)

2.6 Contractor Eligibility



Step 12: Once the profile is submitted, the following message will appear, informing you that the profile will be reviewed within a couple of business days for eligibility by the Program team.

SUCCESSFULLY SUBMITTED!

Your account has been submitted for review to be registered as an **Eligible Contractor** under Energy Savings for Business program.

You will receive an email once the review is complete.

[ACCOUNT PAGE](#)

[LOG OUT](#)

[Click here to navigate back to table of contents](#)

3. Registering as a Participant

To register as a Participant in the Portal, please complete the following sections:



Registration Tip: having access to the information in the table below will help speed up the registration process.

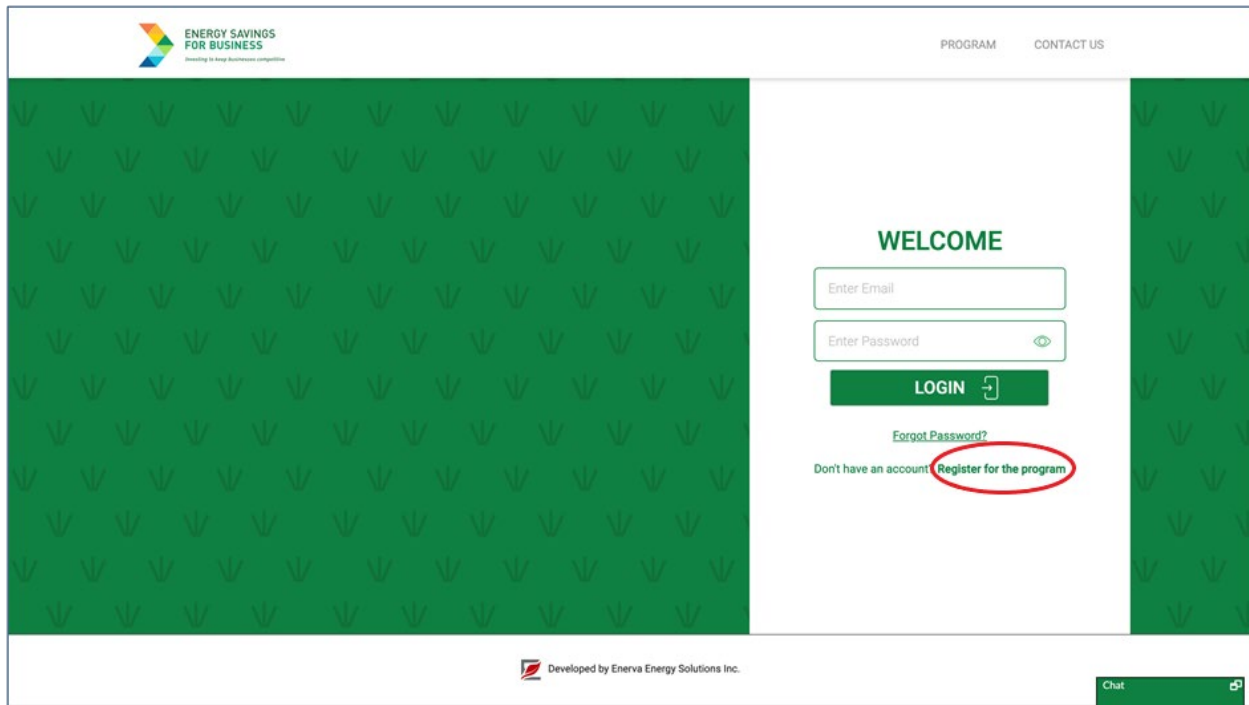
Required Information for Registration	Notes
Contact details of authorised person registering the Participant’s company	<ul style="list-style-type: none"> • First name, last name, • Email, phone number, • Your role in the organisation. <p>*Note that the person filling in the application should be authorised to agree to the Participant Terms & Conditions upon application submission and the completion of the Participant Acceptance</p> <p>**Note that the person registering should be authorised to agree to the Program Portal (“Dolphin”) Terms of Use and three checkboxes for consent for collection and usage of information and communication</p>
Company details	<ul style="list-style-type: none"> • Legal name, • Company address • Industry of the Company • Your role in the company
Legal name	Ensure that you provide the legal name (business name)

[Click here to navigate back to table of contents](#)

3.1 Register



Step 1: Log on to www.ESBProgram.ca and click 'REGISTER FOR THE PROGRAM'.



This will take you to the 'Register Now To Participate In Energy Savings For Business Program' page where you will create an account.

[Click here to navigate back to table of contents](#)

3.2 Create Account



Step 2: Manually fill in the required information in the white cells:

- Create a password that passes the security requirements
- Once you enter your address in the 'Company Address field', the Postal Code, City and Province fields in the grey cells should auto populate.
 - If the postal code information is incorrect, please insert manually.

The green cells contain a drop-down list:

- From the 'Account Category' drop-down list, select 'I am a customer'.
- Select the appropriate field from the 'How did you hear about the program' drop-down list.

Review the terms and policies by clicking the link or the dropdown arrow on the right. To complete your registration, you must first agree to the Portal's Terms of Use, confirm information you have provided is not personal information, agree to the Uses of Eligible Participant Information, and consent to being contacted by the Program.

Please ensure you have the authority to bind your company to the terms and conditions and agree to the privacy policy.

Application Tip: *The Company Name provided should be the legal name by which the company is registered to conduct its business. The legal name of the company will be used for execution of the registration, Ts & Cs for Code of Conduct and for application of program rules as well as for receiving incentive payments.*

[Click here to navigate back to table of contents](#)

Step 3: Click 'COMPLETE REGISTRATION' at the bottom of the page.

[< Cancel Registration](#)

REGISTER NOW TO PARTICIPATE IN ENERGY SAVINGS FOR BUSINESS PROGRAM

<p>First Name <input type="text" value="Enter Contact First Name"/></p> <p>Last Name <input type="text" value="Enter Contact Last Name"/></p> <p>Business Mobile Number <input type="text" value="🇨🇦 +1"/></p> <p>Email <input type="text" value="Business Email ID"/></p> <p>Enter Password <input type="password" value="Set Password"/></p> <p>Confirm Password <input type="password" value="Re-enter Password"/></p> <p>Account Category <input type="button" value="I am a customer"/></p> <p>How did you hear about the program? <input type="button" value="Select from the list"/></p>	<p>Company Name <input type="text" value="Company's Legal Name"/></p> <p>Company Website <input type="text" value="Company's Website"/></p> <p>Company Address <input type="text" value="Company HQ Address Line 1"/></p> <p>Address Line 2 <input type="text" value="Company HQ Address Line 2"/></p> <p>Postal Code <input type="text" value="Enter Postal Code"/></p> <p>City <input type="text"/></p> <p>Province <input type="text"/></p>
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I agree to the Program Portal("Dolphin") [Terms of Use](#)

I agree that the information ("Participant Information") submitted in this sign-up form and in other communications and forms as part of the Program consists solely of business or commercial information and is not personal information of any individual.

I agree to the Uses of Participant Information

I consent to being contacted by ERA or Enerva by e-mail, text or other electronic means for program-related matters or about other energy efficiency and greenhouse gas reducing technologies, products and services that ERA or Enerva offers.

Developed by Enerva Energy Solutions Inc.

Application Tip: You will not be able to click 'COMPLETE REGISTRATION' and proceed to the next step until you have filled in all the required information and agreed to terms and policies. An error message will highlight fields with invalid entries that must be corrected before you can proceed.

[Click here to navigate back to table of contents](#)

Step 4: Click 'CREATE ACCOUNT' to proceed to the next step.

CREATE ACCOUNT?

You are about to create an account for **12322242 Alberta Ltd.** as a customer.

CREATE ACCOUNT

CANCEL ACCOUNT CREATION

Application Tip: If you need to change any information before creating an account, click 'CANCEL ACCOUNT CREATION' and you will be taken back to the prior screen. Changes can be made as required and no information will be saved until an account is created.

3.3 Email Verification



Step 5: Once you click 'CREATE ACCOUNT', the following message will be displayed, and you will need to click on the 'CONFIRM EMAIL ID' verification link sent via email to access your account page.

VERIFICATION EMAIL SENT TO YOUR EMAIL ID!

Please visit your email inbox and **click on the verification link** to access your account page.

If you haven't received the email in your primary inbox, please check your spam and promotions folders.

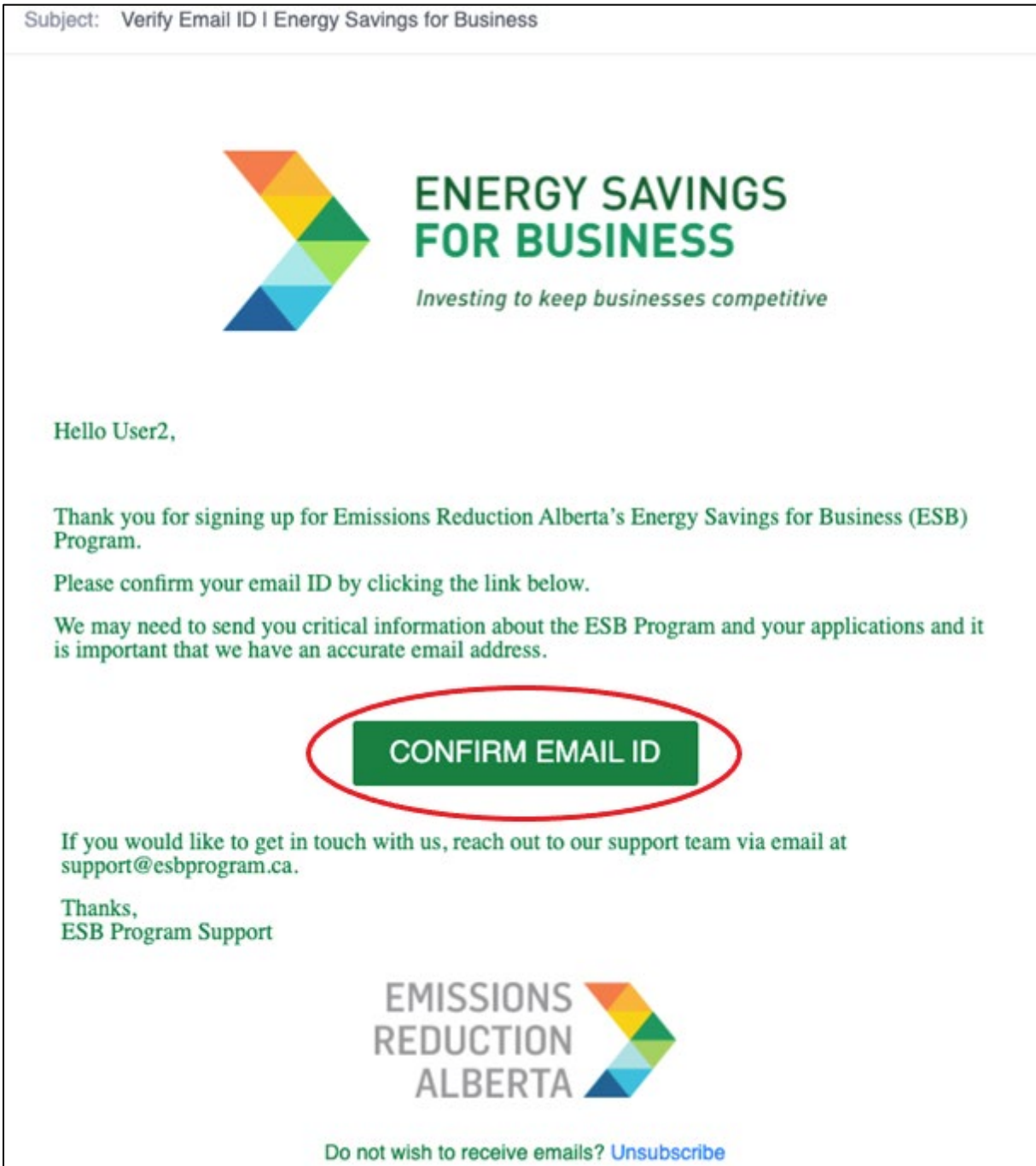
Did not receive the verification email?

RE-SEND EMAIL

LOG OUT

[Click here to navigate back to table of contents](#)

Application Tip: If you do not receive an email with the verification link, please check your Spam/Junk folders. If you still cannot find the email, click on 'RE-SEND EMAIL' and try again. You can also always contact the Program's contact centre to help troubleshoot any issues.



Once you click on the 'CONFIRM EMAIL ID' link in the email, you will automatically be re-directed to the Participant Profile page.

[Click here to navigate back to table of contents](#)

3.4 Complete Participant Profile



Step 6: The Participant profile page provides a summary of the information used to create your account. You are now required to fill in additional information to become an Eligible Participant.

Welcome, Test

Your profile is incomplete. Click on **Complete Details** below to complete your profile to be able to start submitting new applications.

Account Overview | Customer

Company Name: Test Company	Address: 123 Pioneer Drive Kitchener, Ontario N2P 2B4
Customer ID: CUS-1042	Change Password
Contact Name: Test User	Complete Details
Phone Number: 1555555555	
Email ID: xodimom196@combcub.com	

To complete your profile, click 'COMPLETE DETAILS'. The page on the following page appears, and Account and Company Details can be edited if required, and Code of Conduct and License Requirements can be reviewed.

Application Tip: Once your profile is complete, the color on the screen will change to blue.

[Click here to navigate back to table of contents](#)

Step 7: Once changes have been made, click 'SAVE & PROCEED' to continue.

< Back

COMPLETE PROFILE AND SUBMIT FOR REGISTRATION

1 Account Details 2 Company Details

First Name	<input type="text" value="User2"/>	Company Name	<input type="text" value="12322242 Alberta Ltd."/>
Last Name	<input type="text" value="User2"/>	Company Website	<input type="text" value="www.albertatest.com"/>
Business Mobile Number	<input type="text" value="+1 (902) 903-9033"/>	Company Address	<input type="text" value="Edmonton, AB, Canada"/>
Work Number(Optional)	<input type="text" value="+1"/>	Address Line 2	<input type="text" value="Company HQ Address Line 2"/>
Extension(Optional)	<input type="text" value="XX - XXX"/>	Postal Code	<input type="text" value="T1X 8H7"/>
Email	<input type="text" value="mosak78084@wedbo.net"/>	City	<input type="text" value="Edmonton"/>
Account Category	<input type="text" value="I am a customer"/>	Province	<input type="text" value="Alberta"/>

SAVE AND PROCEED

Developed by Eneva Energy Solutions Inc.

Application Tip: An error message will highlight fields with invalid entries that must be corrected before you can proceed. You will only be able to click 'SAVE AND PROCEED' once all fields have been filled in.

[Click here to navigate back to table of contents](#)

Step 8: On this page you will be required to fill out appropriate descriptions for your role in the company, industry, and the applicable NAICs code. If you do not know your NAICs code, you can find it by clicking the dropdown and finding the two digit code that best represents your company. Click 'SAVE AND SUBMIT' to continue.

Application Tips:

- Multiple options can be selected from the drop-down menus.
- An error message will highlight fields with invalid entries that must be corrected before you can proceed. You will only be able to click 'SAVE AND SUBMIT' once all fields have been filled in.

[Click here to navigate back to table of contents](#)

3.5 Submit Details



After updating the profile details, next step is to submit the profile.

SAVE DETAILS?

You are about to complete your registration as a participant of the Energy Savings for Business Program.

Please confirm that the details you have submitted are accurate.

[SUBMIT DETAILS](#)

GO BACK & REVIEW DETAILS

Step 9: Click 'SUBMIT DETAILS' to submit the profile or click 'GO BACK & REVIEW DETAILS' to review and update details.

Once the details are submitted, the following confirmation message will pop-up confirming account set up.

SUCCESSFULLY SUBMITTED!

Your account has been set up for the Energy Savings for Business Program.

ACCOUNT PAGE

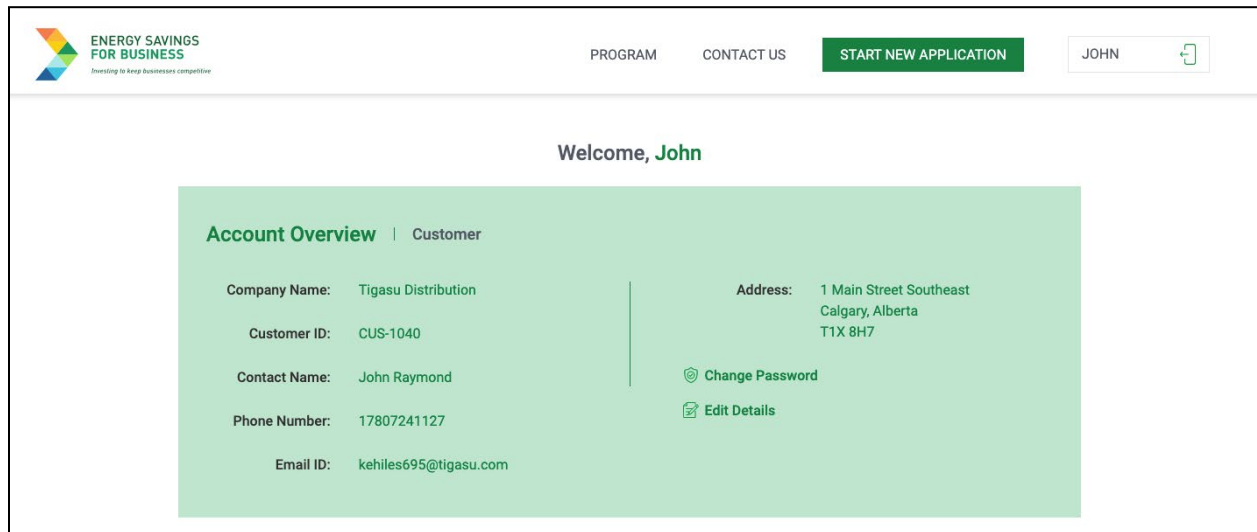
LOG OUT

[Click here to navigate back to table of contents](#)

4. Account Overview

When an participant or contractor logs into the Portal, the page below will appear. The specific image below is for a Participant account since it says “Customer” beside “Account Overview” and a Customer ID is presented. If it was a contractor account, it would say “Contractor” beside “Account Overview” and a Contractor ID would be presented

This page provides an overview of the account details and allows the user to make changes to account details or password if necessary.



[Click here to navigate back to table of contents](#)

5. Getting Ready to Start Your Application

Application Tip: *having access to the information below will help speed up the application process.*

- Project Information:
 - Estimated Project Start Date
 - Estimated Project End Date
 - If any expenses were incurred before submission. If so, how much expenses?
 - Is the project receiving funding from other sources? If so, which sources?
- Contractor Information:
 - Name of Contractor
 - Whether the participant will give the contractor access to application to make edits
- Facility Information such as:
 - Facility Address
 - Facility Heating Technology and Fuel Type
 - Facility Cooling Technology and Fuel Type
 - Facility Square Feet
 - Facility Rate Class for Electricity
 - Facility Occupancy Information
- Measure Information:
 - Confirmation that Measures meet requirements from both Participant Terms and Conditions and Eligible Measures List
 - Specification Sheets
 - Cost Information
 - Equipment and Materials
 - Labour
 - Design and Other

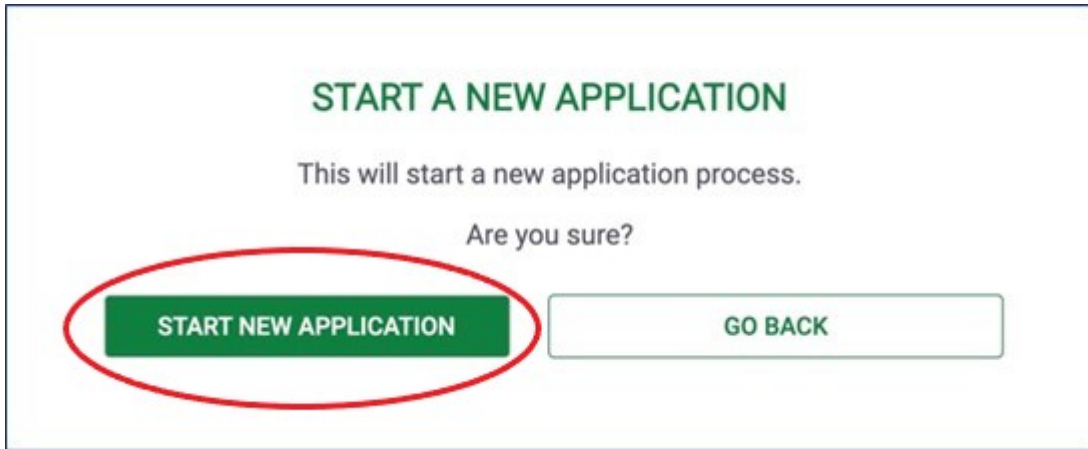
For more information, the program Guidebook can be referenced, as well as the measure-specific application checklists.

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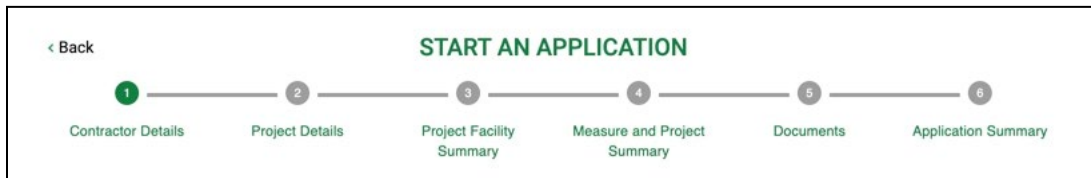
6. Starting a New Application

Only a registered participant account can create a new application for Project Incentives. After Program registration and participant details have been filled in, the participant will be allowed to create new applications in the Portal. From the participant account overview page, click “Start New Application” to begin.

Step 1: Click ‘START NEW APPLICATION’



To complete a new application the participant will need to complete the following sections:



3.6 Contractor Details



The participant must work with an Eligible Contractor to be qualified as an Eligible Project. This page can only be completed by the Participant.

[Click here to navigate back to table of contents](#)

Step 2: Please select your preferred contractor from the drop-down menu.

Application Tip: There is a search function in the dropdown where you can type in the first few letters of the contractor's name and they will appear.

You may see many of your contractors, sub-contractors, suppliers and distributors on this list but you should select your primary contractor who will be responsible for completing your project and making edits to your application (if you provide them with access).

Step 3: Participant has the option of giving their contractor access to help complete their application:

Option A: No, I will complete the application myself

Option B: Yes, I want to give my contractor access to this application.

Note: selecting Option B will allow your Eligible Contractor to view all project details and they can assist with completing the application.

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START AN APPLICATION

1 Contractor Details 2 Project Details 3 Project Facility Summary 4 Measure and Project Summary 5 Documents 6 Application Summary

Contractor Details

Who is your contractor? Enerva Energy Solutions |

Do you want the contractor to be given access to help you complete the application? Yes, I want to give access |

Note: If you choose to give your contractor access to add/edit details of this application, we will inform the contractor on your behalf and provide the contractor access to add/edit certain sections of the application form.
You will have to:

1. Coordinate and fill the application with the help of the contractor.
2. Ensure that the data provided is accurate.
3. Review and submit the application yourself. Your contractor can't submit your application on your behalf.

ASSIGN CONTRACTOR

Step 4: By clicking 'Assign Contractor' the participant will be saving and proceeding to the Project Details section. An automated e-mail will be sent to the selected Contractor notifying that they have been selected and whether they will have edit or read only access.

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3.7 Project Details



This page can only be completed by the participant.

Step 5: Enter name of the application.

Application Tip: This should be a name that you can easily remember and associate with the application (e.g. “Lighting in 12th Street Warehouse”)

Step 6: Select estimated project start date from the calendar pop up. This can be any date from November 1, 2020 to January 31, 2022.

Step 7: Select estimated project completion date.

Application Tip: The default project completion deadline will be six months from the time of application submission. If your project is estimated to be completed after the deadline, you will need to apply for an extension via the Application Review or Change Request process. Details for both of these processes are available in the Program Guidebook or by contacting support@esbprogram.ca.

Step 8: Select answer for whether the project has received or will be receiving other funding, financial incentives, grants or subsidies? Yes or No

If Yes: a) Enter source of funding

b) Enter amount of funding

Step 9: Enter in dollar value of any eligible expenses incurred prior to application submission. (This field will only be visible until April 30, 2021)

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< Back **START AN APPLICATION**

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Contractor Details Project Details Project Facility Summary Measure and Project Summary Documents Application Summary

Project Details

Application (or) Program Name ⓘ

Estimated Project Start Date ⓘ

Estimated Date of Project Completion ⓘ

Has the Project received or is the Project receiving other funding, financial incentives, grants or subsidies?

Sources of all other funding, financial incentives, grants and subsidies(Optional) ⓘ

Total amount of all other funding, financial incentives, grants and subsidies(Optional) ⓘ

Amount of eligible expenses incurred Prior to Application Submission ⓘ

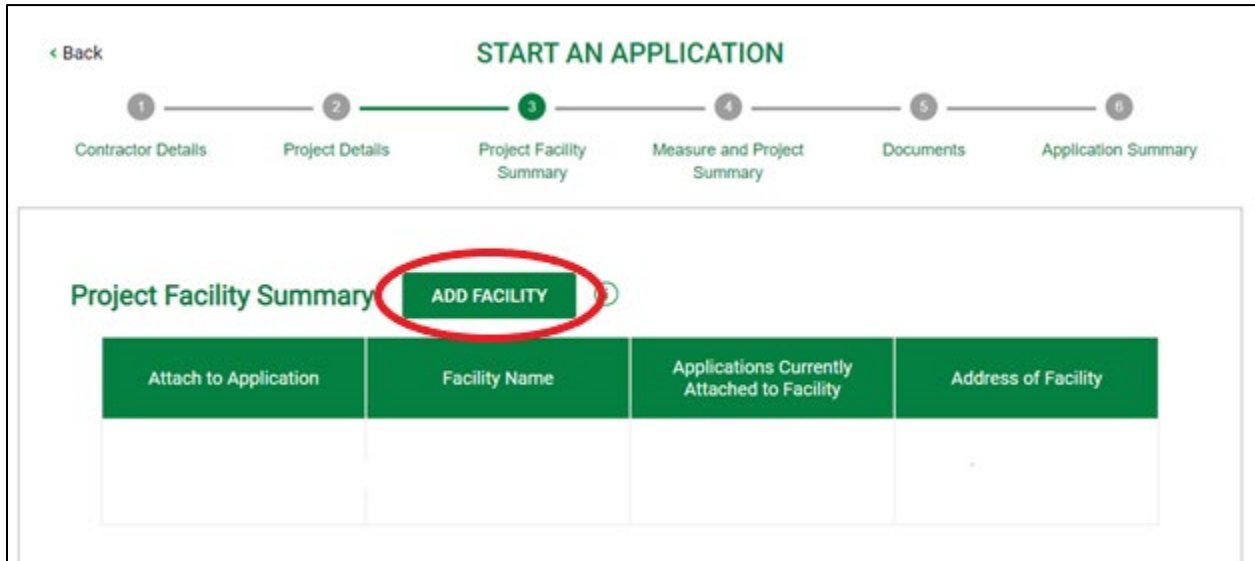
Step 10: Click ‘SAVE AND PROCEED’ to continue to Project Facility Data or click ‘SAVE & EXIT’ to exit to Accounts & Application Overview page.

3.8 Project Facility Summary

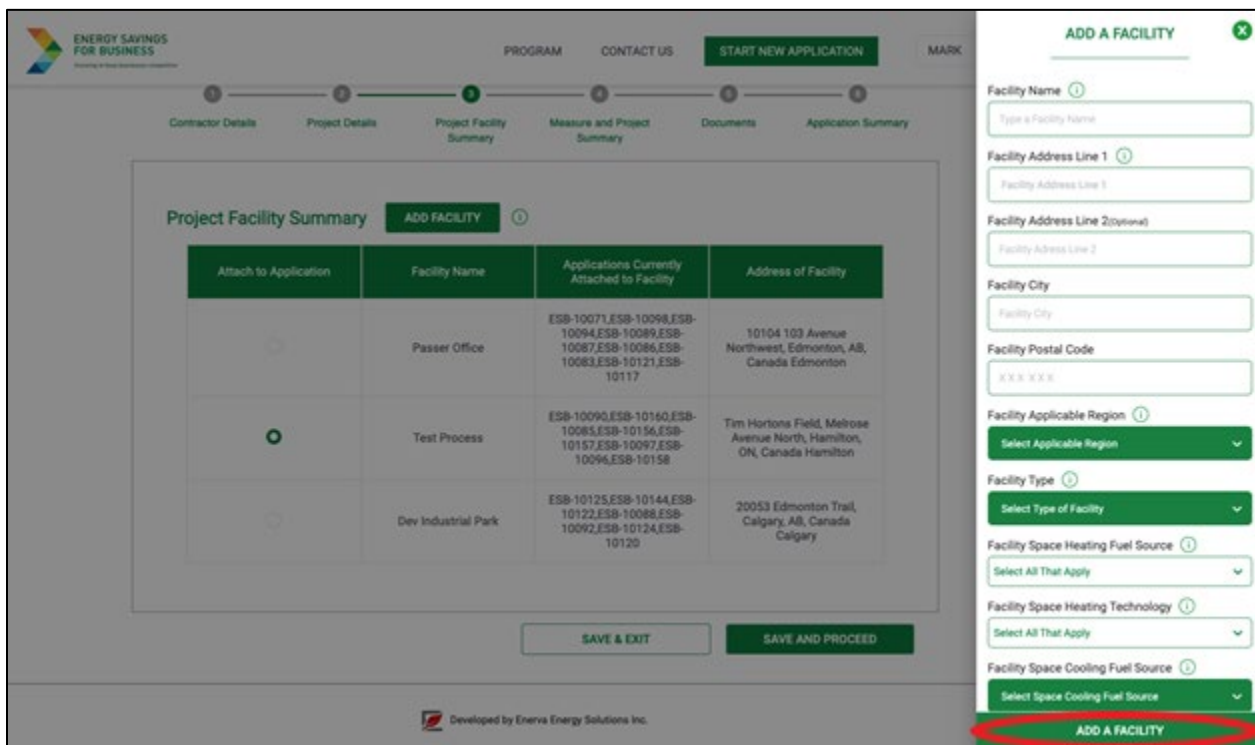


This page can be completed by either the participant or the contractor. If this is a participant’s first time applying for a Project Incentive through the ESB Program, they will need to add their facility information. However, if an application was previously submitted then there is an option of selecting an existing facility that was added in a previous Application.

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Step 11: To add a new facility, click 'ADD FACILITY'. A dynamic column (as shown below) will appear on the right side of the window to allow for participant input.



Once all required information has been entered, click 'ADD A FACILITY' at the bottom of the right column. Any newly added or previously added facilities will appear under "Project Facility Summary".

Application Tip: There can be only one facility per application. You have the ability to create and save additional facilities for future applications.

[Click here to navigate back to table of contents](#)

Step 12: Select the relevant facility (existing or newly added) and then click ‘SAVE AND PROCEED’ to move forward with the application.

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START AN APPLICATION

1 Contractor Details 2 Project Details 3 Project Facility Summary 4 Measure and Project Summary 5 Documents 6 Application Summary

Project Facility Summary

ADD FACILITY ⓘ

Attach to Application	Facility Name	Applications Currently Attached to Facility	Address of Facility
<input type="radio"/>	Passer Office	ESB-10094,ESB-10083,ESB-10089,ESB-10098,ESB-10117,ESB-10087,ESB-10071,ESB-10086,ESB-10121	10104 103 Avenue Northwest, Edmonton, AB, Canada Edmonton
<input checked="" type="radio"/>	Test Process	ESB-10090,ESB-10156,ESB-10085,ESB-10157,ESB-10096,ESB-10158,ESB-10097	Tim Hortons Field, Melrose Avenue North, Hamilton, ON, Canada Hamilton
<input type="radio"/>	Dev Industrial Park	ESB-10120,ESB-10092,ESB-10125,ESB-10122,ESB-10088,ESB-10124,ESB-10144	20053 Edmonton Trail, Calgary, AB, Canada Calgary

SAVE & EXIT **SAVE AND PROCEED**

Application Tip: Must click the circle to attach facility to application and to ‘SAVE AND PROCEED.’

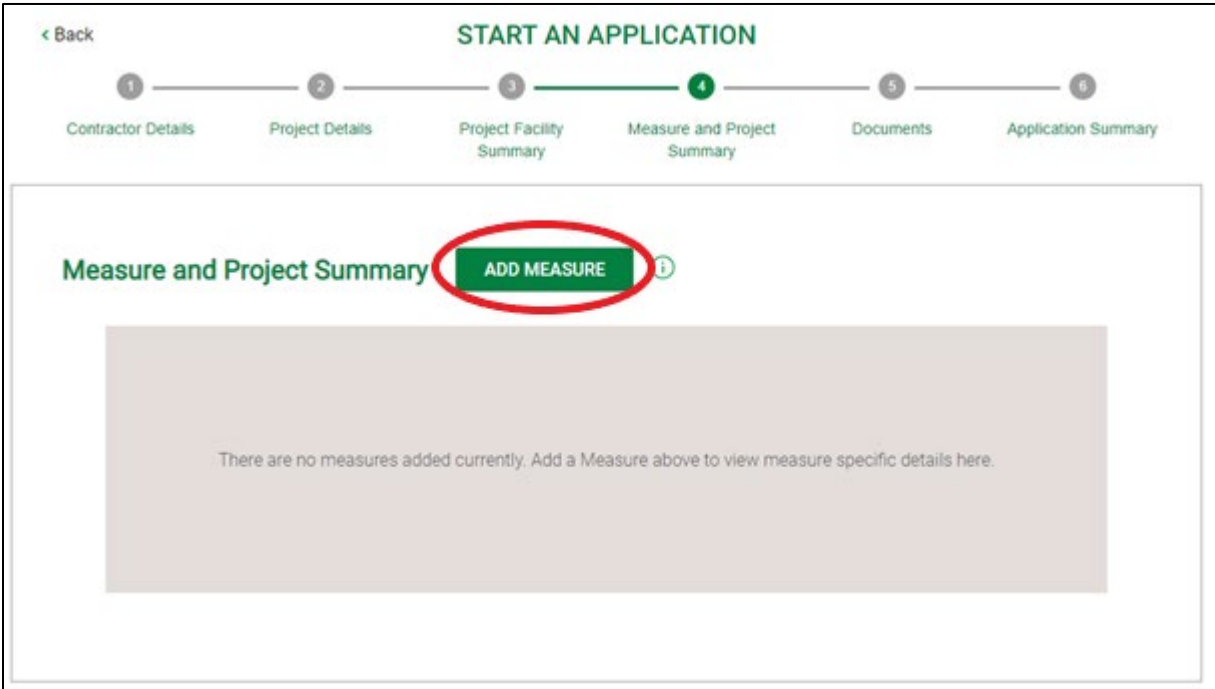
[Click here to navigate back to table of contents](#)

3.9 Measure and Project Summary



This page can be completed by either the participant or eligible contractor. This page requires the details of the Eligible Measure to be implemented for the chosen Eligible Facility.

Step 13: Click “ADD MEASURE” to add an Eligible Measure.



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Step 14: Choose one of the desired Measure Categories, then the Measure Type and finally the specific Measure. Input the MEASURE SPECIFIC INFORMATION in the provided fields and attach necessary documents as required. Reference the Measures List for additional Measure specific information.

Application Tips:

- There are certain fields for which the values will be automatically determined based on participant's inputs. Once all the information has been recorded, click 'GET CALCULATED VALUES' to auto-fill the grey fields.
- For CHP and Solar PV, please note that the Interconnection (Form A) Application is required before project pre-approval.
- Please be mindful of units pertaining to certain fields.
- To view detailed measure specific information required for each measure, please view the Measure Application Checklists on our website [Program Resources](#) page.

After entering all the details and once the calculated values have been determined, if changes need to be made then click 'EDIT DETAILS' at the bottom of the column, otherwise, click 'ADD MEASURE' to proceed with the application.

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< Back **START AN APPLICATION**

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 Contractor Details Project Details Project Facility Summary Measure and Project Summary Documents Application Summary

Measure and Project Summary ADD MEASURE ⓘ

Measure	Quantity	Estimated Emissions Reduction (Lifetime)	Estimated Incentive
Solar PV - Systems less than 15 kW	5	218.02 tonnes	\$5,500.00
Total		218.02 tonnes	\$5,500.00

SAVE & EXIT
SAVE AND PROCEED

After a Measure has been added, it will appear under the “Measure and Project Summary” as depicted above.

3.10 Documents



On this page you will be required to upload documents, such as Invoices, Quotes and Specification Sheets for the Eligible Project.

Step 15: Drag and drop or click within the grey region to select documents relevant to the Eligible Project.

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APPLICATION ID: ESB-10108



Documents



Select from computer (or) Drag and Drop Invoices and Quotes and Specification Sheets as required to upload. Acceptable file types: .JPEG, .PNG, .PDF, .docx, .xlsx

Upload Summary

There are no documents uploaded currently. Upload a document above to add it to your application.

SAVE & EXIT

SAVE AND PROCEED

[Click here to navigate back to table of contents](#)

Upload Summary

Document Name	
Quote.pdf	 View  Edit Name  Delete
Invoice.pdf	 View  Edit Name  Delete
SolarPV_Specifications.pdf	 View  Edit Name  Delete

The uploaded documents will appear under Upload Summary where the participant has the option to View, Edit Name, or Delete the uploaded document.

Application Tips:

- *The documents required will differ by the Eligible Measure. At a minimum, all applications will require a cost quote/invoice at the pre-project application stage. The cost quote/invoice should identify the manufacturer name and model numbers of the equipment. Additionally, the costs provided in the cost quote/invoice should align with the sum of the three types of costs provided in the application for each Eligible Measure.*
- *To view detailed measure specific information required for each measure, please view the Measure Application Checklists on our website [Program Resources](#) page.*

Step 16: Once all documents have been uploaded, click 'SAVE AND PROCEED' to go to the next page.

3.11 Application Summary



This page provides the summary of the project. Please ensure the information listed under the following fields is correct as per the inputs entered in the application:

- Facility Details
- Measure Details
- Document Summary
- Project Summary

[Click here to navigate back to table of contents](#)

These sections can be seen in the screenshots below:

Application Summary

Facility Details

Facility Name	Region	Facility Address	Facility Ownership	Facility Type	Facility Owner Approval Obtained
Test Process	Calgary and Area	Tim Hortons Field, Melrose Avenue North, Hamilton, ON, Canada, Hamilton - L8L 8C1	Owned	Retail	No

Measures Details

Measure	Quantity	Estimated Emissions Reduction (Lifetime)	Estimated Incentive
Fixture Mounted Dual Occupancy and Daylight Control >= 10,000 Lumens	100	73.02 tonnes	\$2,500.00
Total		73.02 tonnes	\$2,500.00

Documents Summary

There are no documents uploaded currently.

[Click here to navigate back to table of contents](#)

Project Summary

Contractor Name	Enerva
Application Name	ESB-undefined
Estimated Project Start Date	04/08/2021
Estimated Date of Project Completion	05/07/2021
Is the project receiving other funding, financial incentives, grants or subsidies?	No
Amount of eligible expenses incurred Prior to Application Submission	\$ 0

Requirements for Submission

The Applicant represents and warrants as follows:

1. All information set out in this Application is complete, true and accurate.
2. The Applicant meets the eligibility requirements set out in the [Terms and Conditions](#) to be a Participant.
3. The facility meets the requirements set out in the [Terms and Conditions](#) to be an Eligible Facility.
4. The Measures meet the requirements set out in the [Terms and Conditions](#) to be Eligible Measures.
5. The Participant has not received, is not receiving nor will receive any financial incentives, funding, subsidies, grants or other monies as a result (directly or indirectly) of the TIER Regulation, the repealed Climate Leadership Act. Or the Pan-Canadian Framework programs.

[Click here to navigate back to table of contents](#)

The Applicant agrees and acknowledges as follows:

1. This Application creates no legally binding obligations whatsoever on the part of ERA. Without limiting the foregoing, the Applicant agrees (i) that no "Contract 'A'" is created, and (ii) that ERA is in no way obligated to provide any funding or other benefit whatsoever to the Applicant as a result of submitting this Application. Project Incentives may be payable only pursuant to a legally binding Participant Acceptance and subject to acceptance of this Application.
2. All costs to prepare and submit this Application are the sole responsibility of the Applicant.
3. ERA may verify with any Applicant or with any third party any information set out in this Application, and may share information with such third party in order to do so.
4. ERA may accept or refuse this Application for any reason and at its sole discretion, even where the Applicant meets all Program requirements.
5. In order to participate in the Program, the Applicant understands that it must enter into a Participant Acceptance and comply with all terms and conditions thereof.
6. Prior to entering into a Participant Acceptance, any amounts spent by the Applicant on the purchase and installation of Eligible Measures may not be eligible for and may not receive a Project Incentive. Any such amounts are at the sole risk of the Applicant.
7. ERA may waive any informality or irregularity at its discretion or to otherwise exercise administrative discretion with respect to an Applicant or its compliance with the Program requirements.
8. Payment of any Project Incentive or other amount by ERA is subject to the availability of Program funding. Program funding may cease without notice.
9. ERA may make changes, including substantial changes, to this Program or its documents (including the Eligible Measures List, Application and Participant Acceptance) without any liability whatsoever to the Applicant.
10. The Program or any part of it, including the incentives for the project or any Eligible Measure, may be changed, reduced, increased, amended, suspended, cancelled or terminated at any time and for any reason whatsoever without prior notice to the Participant, in each case without any obligation, liability or any reimbursement to the Applicant.

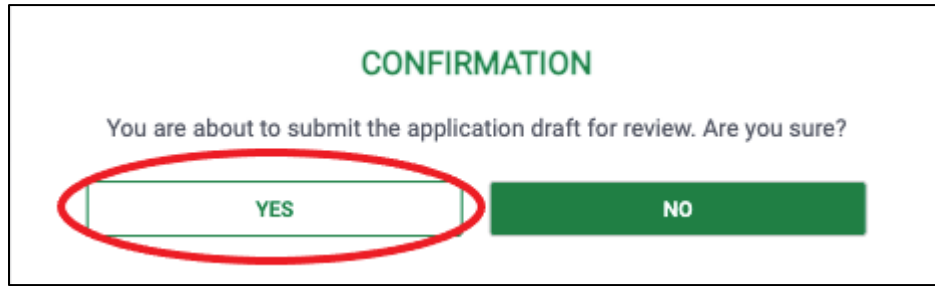
The applicant agrees to the above representations, warranties, acknowledgments, terms and conditions

SAVE & EXIT

SUBMIT FOR REVIEW

Application Tip: Please thoroughly read "Requirements for Submission" to ensure all eligibility requirements are met and agree to the listed representations, warranties, acknowledgements, terms and conditions.

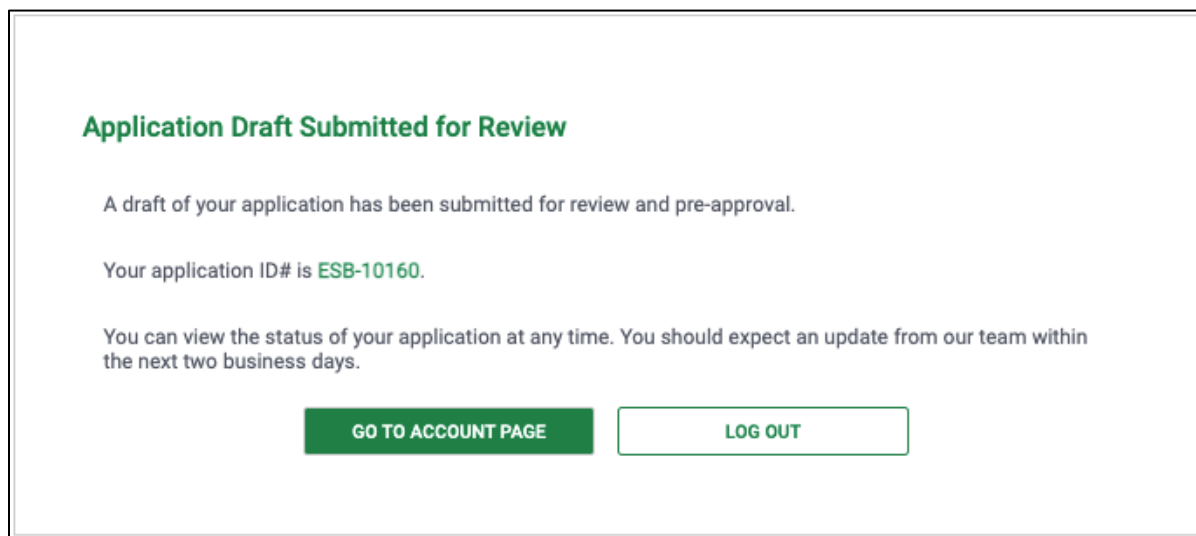
[Click here to navigate back to table of contents](#)



Step 16: Click 'SUBMIT FOR REVIEW' and when prompted with a confirmation dialogue box, click 'YES' to submit the application.

Congratulations! The application has been submitted. It will be now be reviewed by our review team. If there are any questions, you will be provided with an Information Request requesting specific information. You can also log-in at any time and see the status of your application.

Application Tip: *If you have received an Information Request and you are uncertain of what to do, you can contact support@esbprogram.ca.*



You can now choose to visit your account page to view the status of your submitted projects, submit a new project or log out.

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7. Application Overview

The application overview page provides visibility to the participant or contractor to see the current status of their Applications.

The following can be found under the application overview:

1. **Contractor Name** – Which contractor the Application is assigned to.
2. **Application Name** – Chosen by the participant.
3. **Stage** – Current stage of the Application
 - a. Pre-Project
 - b. Pre-Approved
 - c. Post-Project
 - d. Incentive Payment
4. **Status** – Current status of the Application

Application Status	Status Definition
Application Draft	Application started, but not submitted. The application is unlocked. To enter the review queue, it must be submitted by the Applicant.
Application Draft Submitted	Application submitted for pre-approval review. The application is locked and can't be edited. It has entered the review queue. If you want it to be unlocked, please submit a request to the ESB program contact centre.
Application Draft Under Review	Application submitted for pre-approval is being reviewed. The application is locked and can't be edited. If you want it to be unlocked, please submit a request to the ESB program contact centre.
Application Information Requested	Information has been requested for the application under review. The application is unlocked and it can be edited. Please be aware that the application must be re-submitted by the Applicant (customer) to re-enter the review queue.
Application Draft Approved	Application is pre-approved and awaiting Participant Acceptance to be completed. The Applicant (customer) needs to log-in and complete the Participant Acceptance for the incentive reservation to be confirmed.
Application Rejected	Application has been rejected. The application will be locked. The notes for the rejection will be available to review.
Application Submitted	Participant has accepted the Participant Terms and Conditions, the pre-project application is approved and the incentive has been reserved. The incentive has been reserved, and the project can be executed and completed.

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Applications Overview | Pre-Project Applications ▼ **START NEW APPLICATION**

Search for Applications 🔍 FILTER BY STATUS 👤

Application #ESB-10160

Contractor Name : **Enerva**

Application Name: **Sample Application 99**

Stage : **Pre-Project**

Status : **Application Information Requested**

[Information Requested >](#)

Application #ESB-10159

Contractor Name : **Dev Energy Consulting Services Inc.**

Application Name: **Understanding ESB Program**

Stage : **Pre-Project**

Status : **Application Draft Under Review**

[View Details >](#)

Application #ESB-10158

Contractor Name : **Dev Energy Consulting Services Inc.**

Application Name: **ERA Webinar Launch**

Stage : **Pre-Project**

Status : **Application Draft Under Review**

[View Details >](#)

Application #ESB-10157

Contractor Name : **Dev Energy Consulting Services Inc.**

Application Name: **Measure - Energy Star ID Check**

Stage : **Pre-Project**

Status : **Application Draft**

[Complete Application >](#)

< 1 2 3 4 5 >

Application Tip: The phase of your application submission will change colours based on its status. You can also see the status in the box. Application Draft is pink, Application Draft Under Review is light blue, and Application Information Requested is orange.

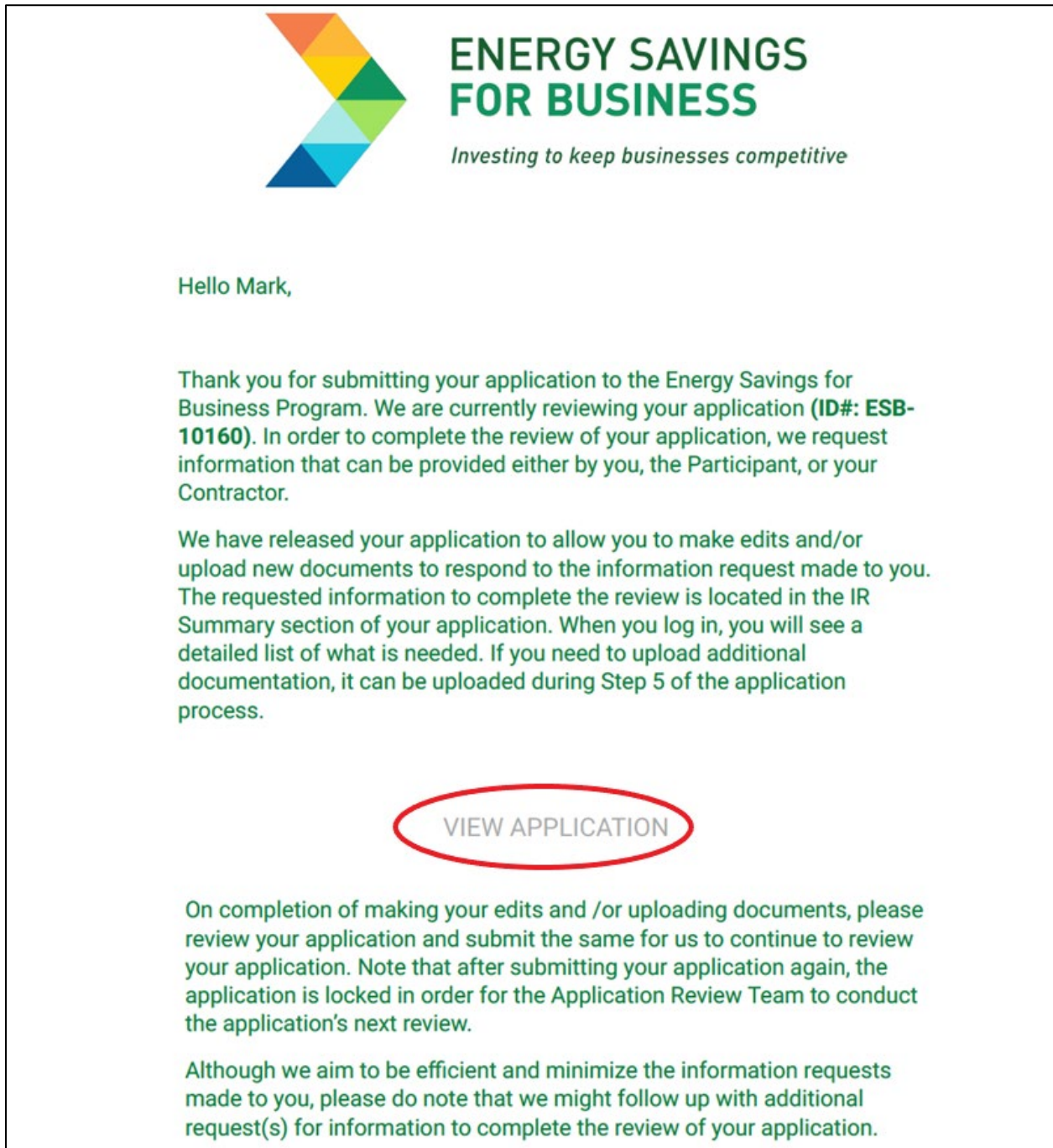
[Click here to navigate back to table of contents](#)


8. Application Information Requests and Pre-Project Approval

3.12 Application Information Requests

If your application needs any clarification or additional supporting documents, the review team will send an “Information Request”. You will receive an email notifying you of the Information Request(s) with details of discrepancies that need to be addressed.

Step 1: Click ‘VIEW APPLICATION’ or log into application Portal to view application.



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Investing to keep businesses competitive

Hello Mark,

Thank you for submitting your application to the Energy Savings for Business Program. We are currently reviewing your application (ID#: **ESB-10160**). In order to complete the review of your application, we request information that can be provided either by you, the Participant, or your Contractor.

We have released your application to allow you to make edits and/or upload new documents to respond to the information request made to you. The requested information to complete the review is located in the IR Summary section of your application. When you log in, you will see a detailed list of what is needed. If you need to upload additional documentation, it can be uploaded during Step 5 of the application process.

[VIEW APPLICATION](#)

On completion of making your edits and /or uploading documents, please review your application and submit the same for us to continue to review your application. Note that after submitting your application again, the application is locked in order for the Application Review Team to conduct the application’s next review.

Although we aim to be efficient and minimize the information requests made to you, please do note that we might follow up with additional request(s) for information to complete the review of your application.

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< Back **APPLICATION ID: ESB-10160**

Information Requested

Your pre-project application has been reviewed by the ESB Program team and the following additional clarifications/information regarding your application has been requested:

Please provide or ensure the following for Application ESB-10160:

1. A detailed quote or invoice. To be clear the quote or invoice should be itemized to include brand and model numbers. Costs should also be itemized by equipment, labour, design costs, and taxes.

[EDIT APPLICATION](#)

Step 2: Review the statements for discrepancies or deficiencies and click 'EDIT APPLICATION' to make any edits to the application or add supporting documents.

Once you click 'EDIT APPLICATION' you will be able to review and edit your application in the same order as described in Section 6.

Application Tips:

- *Any supporting document(s) to assist with answering the Information Request can be uploaded during Step 5 of the application process.*
- *After the application has been edited to address the Information Request, it must be submitted by the Applicant to re-enter the review queue.*

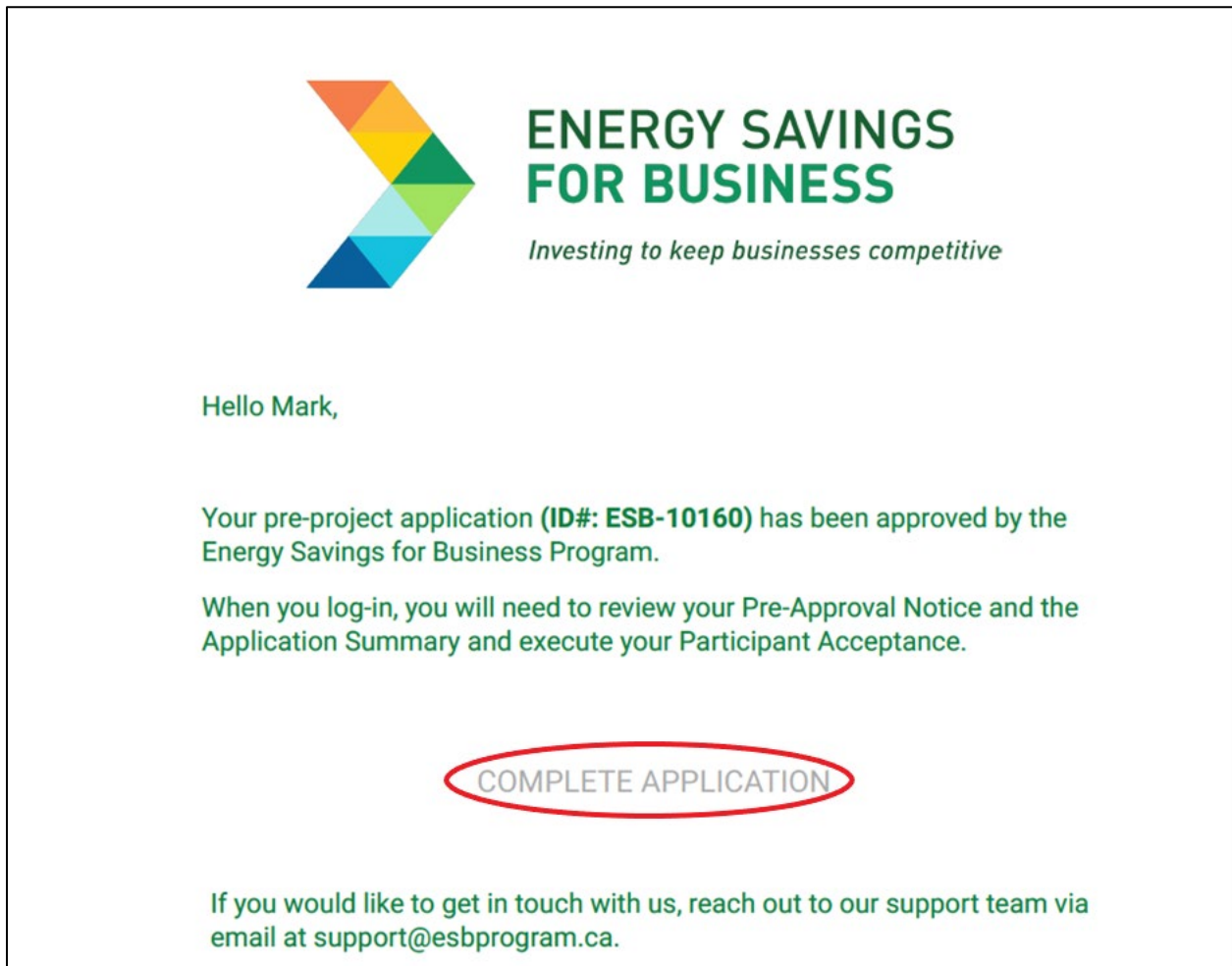
[Click here to navigate back to table of contents](#)

3.13 Pre-Project Approval

Once your Pre-Project application is approved, you will receive a notification by email similar to below. You will be required to then review your application summary and execute your Participant Acceptance.

Application Tip: After an Application is in the status Application Draft Approved, it moves to the Pre-Approval Applications tab in the home page. This is where it can be found to complete the Participant Acceptance.

Step 1: Click 'COMPLETE APPLICATION' or log into application Portal to view application.



[Click here to navigate back to table of contents](#)

Step 2: Review Application Summary and Participant Acceptance.

Participant Acceptance

By signing below, the Participant agrees to be bound by the Participant Acceptance.

Without limiting the foregoing, the Participant confirms the following to ERA:

- The Participant has reviewed the Application Summary, and represents and warrants that all information contained in the Application Summary is complete, true and accurate.
- The Participant has reviewed the **Terms and Conditions**.
- The Participant confirms that it meets the eligibility requirements to be a Participant and that the Facility meets the requirements to be an Eligible Facility.
- The Participant confirms that the Measures set out in the Application Summary meet the requirements to be Eligible Measures, and that the project meets the requirement to be an Eligible Project.
- The Participant has all rights, permits, licenses and authorizations required to carry out the Eligible Project in the Eligible Facility.
- If the Participant is not the owner of the Eligible Facility, then the Participant has obtained the owner's consent to carry out the Eligible Project.

The Participant Acceptance Form may be executed and delivered by electronic means. Any such signatures, including any contract formation on the Portal or record-keeping through electronic means, may be relied upon by the Participant and the ERA and shall have the same legal effect, validity of enforceability as a manually executed signature, physical delivery thereof, or the use of a paper-based record-keeping system, as the case may be.

- All expenses listed in this Application are **Eligible Expenses** as defined in section 6.2 of the **Terms and Conditions** and do not include any expenses which are not Eligible Expenses.

Company Full Legal Name	Passer ⓘ
Company Address	Hwy 552, De Winton, Alberta - T0L 0X0
Participant Contact Name	Mark Hamill
Phone	+1 (647) 425-4340

Type the following sentence in the text box below 'I represent and warrant to Emissions Reduction Alberta that I have authority to bind the Participant' to mark the participant acceptance.

I represent and warrant to Emissions Reduction Alberta that I have authority to bind the Participant

Mark Hamill 04/06/2021

SUBMIT APPLICATION

Step 3: Click the check boxes to accept the specific condition and type “I represent and warrant to Emissions Reduction Alberta that I have authority to bind the Participant”

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Application Tip: If you can not complete the Participant Acceptance on behalf of your company, please contact support@esbprogram.ca for another alternative.

Step 4: Click “SUBMIT APPLICATION” to complete the Participant Acceptance. You will receive a confirmation e-mail with your incentive reservation.



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Hello Mark,

Congratulations, you have executed the Participant Acceptance for your application with the **Application ID#: ESB-10160**. Your project completion deadline date is 10/07/2021 and the incentive that has been reserved for your project is \$2, 500.

Once you complete your project, you can log-in to create and submit your post-project application to apply for your incentive payment. During the post-project application, you will be required to meet additional requirements. These will include, but not be limited to providing an itemized invoice for costs, proof of payments, and other documents required for the measure such as evidence of permits, approved interconnection agreement and proof of equipment disposal.

[VIEW APPLICATION](#)

If you would like to get in touch with us or have any questions about the post-project application requirements, reach out to our support team via email at support@esbprogram.ca.

Step 5: Review and take note of project completion deadline. If your project is estimated to be completed after this date you will have to request an extension via the Change Request process.

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