

Incentive Payment Instructions

Revised: October 25, 2021

As of October 25, 2021, the Energy Savings for Business program has implemented a new incentive payment process. The new process will make receiving incentive payment for your project more streamlined, while maintaining the same high level of security for transactions.

Note: If you already started the incentive payment process for an application in Plooto, you do not need to make any changes. You will continue to use Plooto to receive your payment.

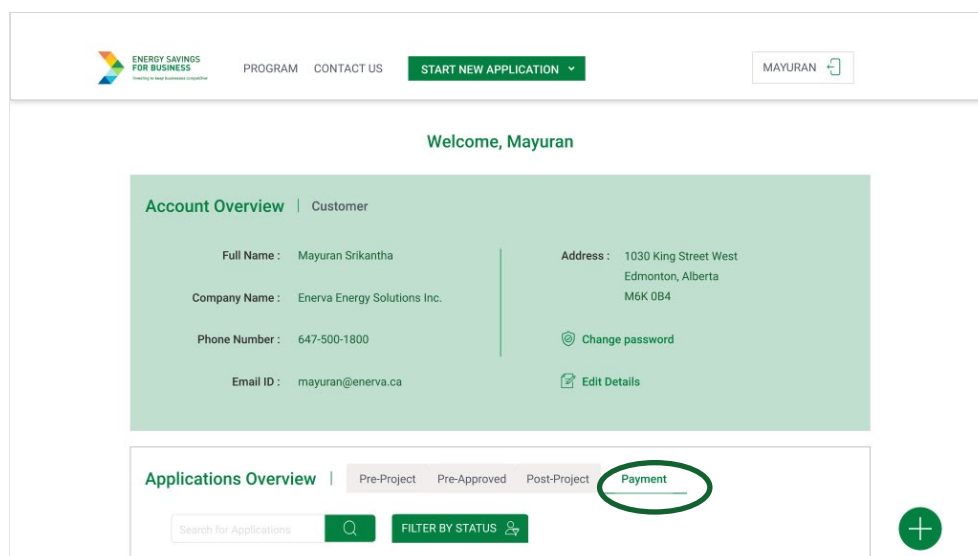
Please see the instructions below for how to receive incentive payments through the new incentive payment process.

The incentive payment process is the last step in the ESB program application journey. At this point, you have completed your project and Emissions Reduction Alberta (ERA) has approved your post-project application. Note: A Participant can assign the incentive payment to go directly to a Contractor. To assign the incentive payment to a Contractor, please add your Contractor to the payee fields in Dolphin (please refer to the [Post Project Application Instructions](#) for additional details). Your Contractor will receive access to the incentive payment process upon approval of the post-project application and the starting of the incentive payment process.

Once the incentive payment has been approved, you will receive an email with the instructions on how to set up the Electronic Funds Transfer (EFT).

Note: If the Contractor has been assigned as the Payee, they will receive this email.

1. Log into the Program Portal. Click on the “Payments Tab” on the Applications Overview section of the homepage.



2. Select the application for which you would like to begin the incentives payment process and click on “Share Banking Details.” This will lead you to the following pop-up screen. Agree to the terms, conditions, and/or consents outlined.

ENERGY SAVINGS FOR BUSINESS

PROGRAM CONTACT US START NEW APPLICATION

MAYURAN

Welcome, Mayuran

SHARE BANKING DETAILS

In order to facilitate incentive payments for this application, **Summer Energy Solutions Inc.** (“PAYEE”) may be required to provide (among other things) the name on the bank account, address, transit number, branch number or institution number, account number and/or SWIFT code of its financial institution (bank).

PAYEE may also be required to agree with any terms, conditions and/or consents required by Eneva Energy Solutions Inc. and should review these in detail.

- The PAYEE acknowledges that entering the banking information and/or mailing address on ESB Program Portal is at the sole risk of the PAYEE.
- I confirm that, as agent for the PAYEE, I am responsible for the accuracy of the information provided by any employees, delegates, consultants, subcontractors, agents or representatives of PAYEE.
- The PAYEE agrees and confirms that Emissions Reduction Alberta [and its service provider, Eneva Energy Solutions Inc.] may share the PAYEE’s name and address and the amount of the Incentive Payment with third party platforms for processing the payment. The PAYEE further agrees that any PAYEE information provided to third party platforms, including but not limited to any payment records may be shared with Emissions Reduction Alberta [and its service provider, Eneva Energy Solutions Inc.]. All PAYEE information received from Plaid will be maintained in confidence.

3. Enter your banking information: name, bank account number, transit number, and institution code. Please ensure that the name on the bank account is the same name as the Payee assigned during the post-project application. To confirm these details, you will then be asked to upload a picture of a void cheque. When you are ready, click “Submit Details.”

ENERGY SAVINGS FOR BUSINESS

PROGRAM CONTACT US START NEW APPLICATION

MAYURAN

Welcome, Mayuran

REQUEST EFT PAYMENT

Share your banking details below to ESB Program for payment processing for the application **#ESB-10179**.

Please confirm that the details you are submitting are accurate. Change requests to the banking details will not be accepted once the details are submitted.

Name on Bank Account: Summer Energy Solutions Inc.

Bank Account Number: 1234567

Transit Code: 10157

Institution Code: 001 - Bank of Montreal

Upload Void Cheque: Select from computer (or) Drag and Drop to upload.
* Acceptable file types: .jpg/.jpeg, .png, .gif, .bmp

SUBMIT DETAILS GO BACK

- To ensure accuracy, please review the summary of your banking information. Click “Submit Details” if you are satisfied with your review or click “Go Back” to change any details.

ENERGY SAVINGS FOR BUSINESS
Helping to shape business competition

PROGRAM CONTACT US START NEW APPLICATION

MAYURAN

Welcome, Mayuran

REQUEST EFT PAYMENT

You are about to share the following banking details to ESB Program for payment processing for application #ESB-10179.

Please confirm that the details you are submitting are accurate. Change requests to the banking details will not be accepted once the details are submitted.

Name on Bank Account: Summer Energy Solutions Inc.
Bank Account Number: 1234567
Transit Code: 12345
Institution Code: 001 - Bank of Montreal

Upload Void Cheque: RBC_VoidCheque.pdf

SUBMIT DETAILS GO BACK

- A screen will appear confirming successful submission and then you will be taken back to the home screen.
- The ESB Review Team will review your payment request. If the payment details you entered matches the information on your void cheque, payment will be processed within four weeks.

Payment Statuses

Stay up to date with your progress of your payment by visiting the Program Portal. Below you will find all the possible statuses and when you will need to take additional steps:

Status	Meaning	Notes
Incentive Recommended	The Post-Project application has been reviewed and approved.	An email is sent to the Participant and Contractor to confirm the post-project application approval. The status will change to ‘Banking Details Pending’ shortly and you will be requested to enter banking details.
Banking Details Pending	The banking details are required.	An email is sent to the Participant or Contractor (whomever was assigned as the Payee) requesting them to enter banking details.
Revise Banking Details	The banking details submitted by the Participant or Contractor contains an issue such that the payment cannot be processed.	If applicable, an email is sent to the Participant or Contractor (whomever was assigned as the Payee) requesting them to revise banking details (troubleshooting tips provided below).

Status	Meaning	Notes
Banking Details in Review	This status indicated that banking details have been successfully submitted and will be reviewed.	The banking details will be reviewed within a few days.
Incentive Recommendation Approval Pending	The payment process has started.	The incentive is being prepared to be issued.
Incentive Approved	The payment has been approved.	An email is sent to the Participant or Contractor (whomever was assigned as the Payee) notifying them that the incentive has been approved.
Incentive Payment in Progress	The payment has been released. It should arrive within 5-7 business days.	An email is sent to the Participant or Contractor (whomever was assigned as the Payee) notifying them that the incentive has been released.
Incentive Payment Completed	The payment is reported to have been completed.	An email is sent to the Participant or Contractor (whomever was assigned as the Payee) notifying them that the incentive payment is complete. Confirmation of payment from the Participant or Contractor (whomever was assigned as the Payee) may be requested. Congratulations, your project has now completed the ESB program!

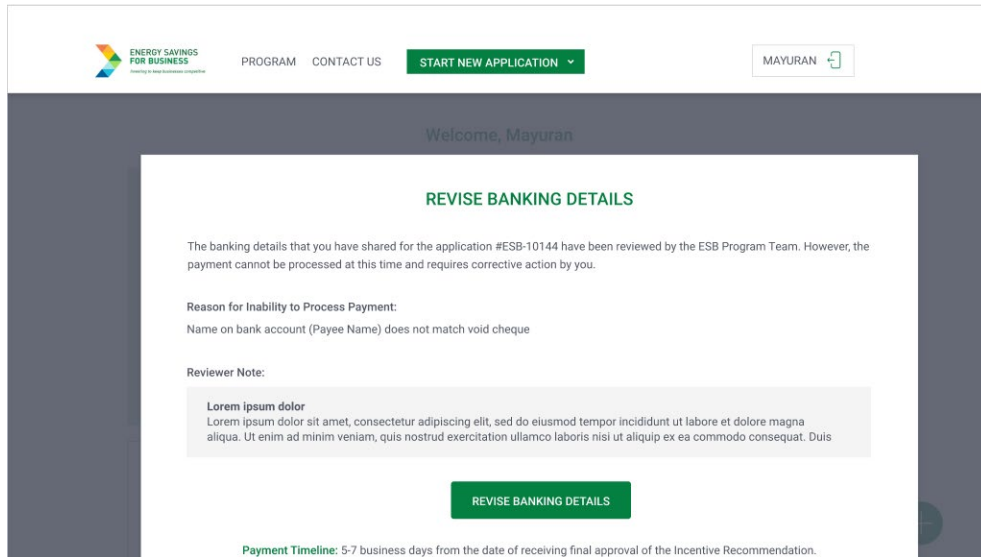
Troubleshooting: How to Revise Banking Details

If the ESB Review team runs into an issue while reviewing your payment request, you will receive an email notifying you of the change in payment status and requesting that you update your banking information.

Here are some reasons that may cause issues:

1. The banking information submitted (name, bank account number, transit number) does not match the uploaded void cheque.
2. A spelling mistake is preventing the payment from going through.

If you are asked to make a change, log into the [Program Portal](#) and view your application in the payments tab. You will see a “Revise Banking Details” pop-up screen:



Here, you will be able see the issue that was found and read the reviewer’s notes. When ready, click on “Revise Banking Details” to be taken back to the step where you entered your banking details. Submit the updated request and our team will review it again.

If you encounter any issues throughout the process or unsure how to find the information required, please reach out to our Contact Centre Team by phone 1-844-407-0025), email (support@esbprogram.ca) or chat (available on the Program Portal and ERA website). We would be happy to assist you.