

# ENERGY SAVINGS FOR BUSINESS

Investing to keep businesses competitive







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# 1. Introduction & Purpose

The SPEED Program uses a Program Portal, which is accessible at <a href="www.ESBspeed.ca">www.ESBspeed.ca</a>, to deliver the program efficiently and effectively. Once logged in to the Program Portal, Participants or Eligible Contractors can create, submit and/or receive access to Application(s). The Program 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 Post-Project Application Instructions is to provide a step-by-step guide to submit a Post-Project Incentive Application in the Program Portal. As such, the instructions are 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 <u>Program webpage</u> 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 Instructions.

If you are unable to find an answer to your question in this document 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: speed@esbprogram.ca

Toll-free: 844-407-0025

# 2. Getting Ready to Start Your Post-Project Application

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

- Project Information:
  - Actual Project Completion Date (in the Pre-Project Application, the date provided was just an estimate)
- Measure Information
  - Confirmation that Measures meet requirements from both the Participant Terms and Conditions and Eligible Measures List
  - Specification Sheets
- Invoice and Proof of Payment
  - Cost Information
    - Equipment and Materials
    - Labour
    - Design and Other
  - Proof of Payment
    - Bank/Credit Card Statement
    - Copy of Cheque
    - Paid stamp on invoice with signature
- If your incentive will increase by more than 5% due to new measures, increasing quantities or
  increasing costs, please <u>do not start</u> your post-project application. Instead, please contact the
  Program to discuss submitting a Change Request.

For more information, the Program Guidebook and Eligible Measures List can be referenced, as well as the Measure-specific application checklists.

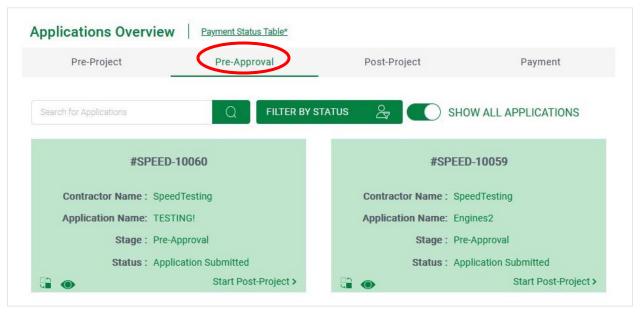
# 3. Starting a Post-Project Application

The Participant will be required to initiate the Post-Project process once the Application has moved to the Post-Project stage. The Participant or Contractor will have the ability to review the Application, but the Participant must submit the Application in the Post-Project stage. The Contractor's ability to view the Application details will be limited to certain steps of the Post-Project Application.

**Application Tip:** Only a Participant with a Pre-Approved application can begin the Post-Project process. If given access by the Participant, the Contractor will have the ability to view and edit portions of the application.

From the Participant account overview page, select the "Pre-Approval" tab to begin.

**Step 1:** Find the Post-Project Application to be submitted and click 'Start Post-Project'.





#### START POST-PROJECT APPLICATION

#### Are you requesting a change to your application?

If you wish to add or change measures, apply for an extension or request and incentive increase of more than 5% of the pre-approved incentive, please go back and submit a Change Request

If you require assistance, please email speed@esbprogram.ca

If you start a Post-Project review, the **Change Request functionality will be disabled** and you will not be able to make any further changes to your application.

GO BACK

NO CHANGE REQUIRED

**Application Tip:** If you need to submit a Change Request, please contact us for assistance.

START POST-PROJECT APPLICATION  Review Post-Project Eligibility Checklist					
	You have obtained invoices, proof of payment, electrical safety permits and other documents.				
Ensured your project's compliance with the <b>Terms and Conditions</b> , Eligible Measures List, conditions outlined in the Pre-Approval Notice and the signed Participant Acceptance					
	GO BACK START POST-PROJECT				

# START POST-PROJECT APPLICATION

# Review Post-Project Eligibility Checklist

- Your project is completed. Your measures have been installed & are operational
- You have obtained invoices, proof of payment, electrical safety permits and other documents.
- Ensured your project's compliance with the **Terms and Conditions**,

  ✓ Eligible Measures List, conditions outlined in the Pre-Approval Notice and the signed Participant Acceptance

GO BACK

START POST-PROJECT

### START POST-PROJECT APPLICATION

This will start post-project Application process for Application ID **#SPEED-10059**. Are you sure?

GO BACK

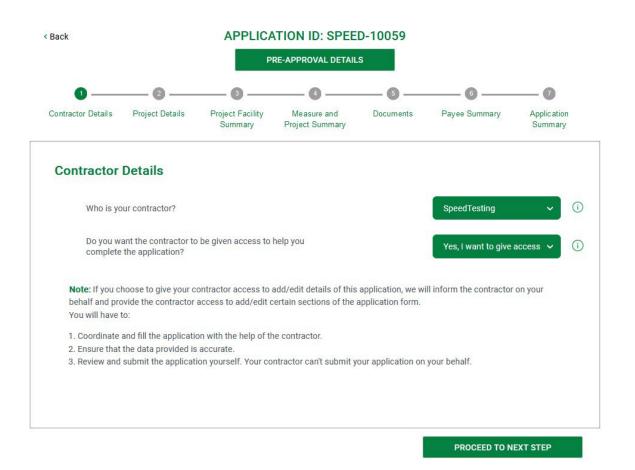
YES, START APPLICATION

To complete a Post-Project Application, the following sections will need to be completed:

#### 3.1 Contractor Details



**Step 2:** Please confirm the Contractor details are correct and click 'Proceed to Next Step'. You may also choose to change a to a different Contractor at this stage of the process.

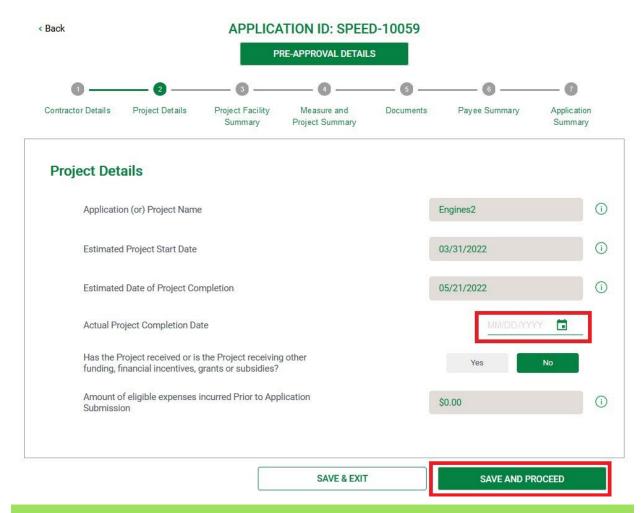


## 3.2 Project Details



This page can only be completed by the Participant. Only the 'Actual Project End Date' field is available for editing.

- **Step 3:** Enter name of the Application.
- **Step 4:** Select the date the project was completed, the click 'Save And Proceed'.



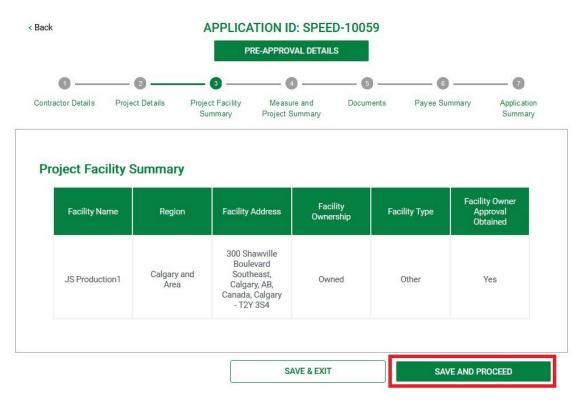
**Application Tip:** You can click 'Save & Exit' to exit to the Accounts & Application Overview page if you wish to return to Post-Project Submission at a later time.

# 3.3 Project Facility Summary



The Facility information is not available for editing at this stage of the project.

**Step 5:** Review the Facility details to confirm they are correct, then click 'Save And Proceed' to move forward with the Application.



**Application Tip:** The facility details cannot be changed. If you see that they are incorrect, please contact <u>speed@esbprogram.ca</u> and you will receive direction on next steps.

#### 3.4 Measure and Project Summary

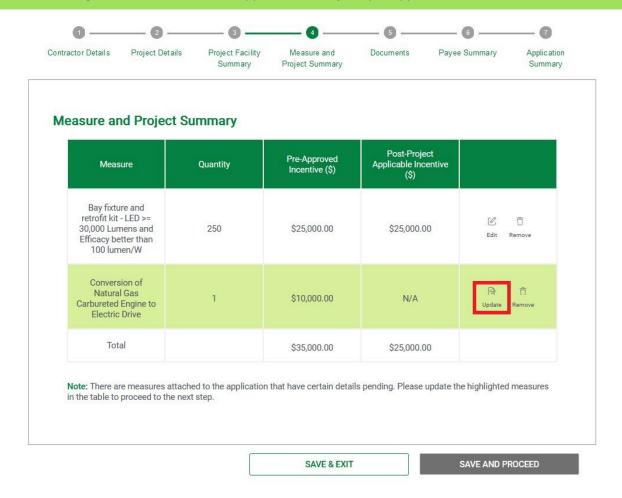


This page can be completed by either the Participant OR Contractor. This page requires the details of the Measure to be implemented for the chosen Facility.

**Step 6:** Review the Measures selected and click 'Edit' to confirm details. Measures can also be removed at this stage with the 'Remove' button. Please note that new Measures cannot be added.

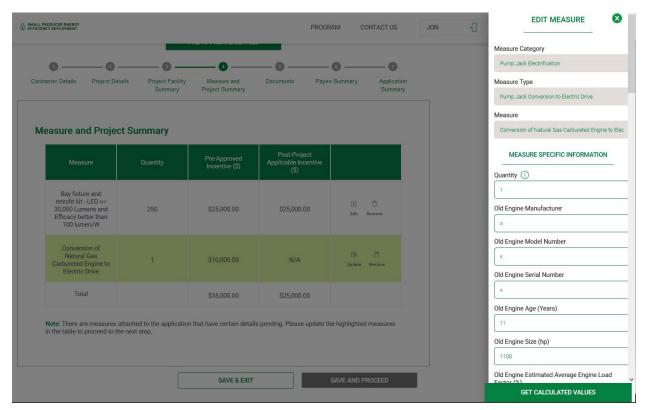
#### **Application Tip:**

- The Measure details will have to be updated with final project costs.
- Please note that new measures can not be added; only quantities to existing measures can be changed, and the incentive is capped at 105% of the pre-approved incentive amount



Application Tip: Measures that require updates will be highlighted in green.

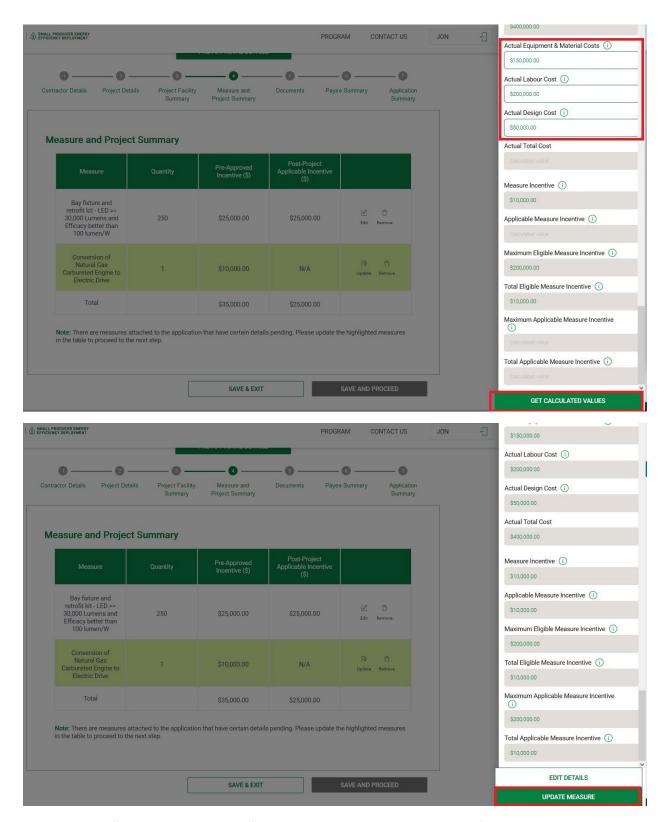
**Step 7:** Review the Measure details and confirm that they are correct. The Quantity can be changed at this stage. Depending on the Measure type there may be some fields that can be changed.



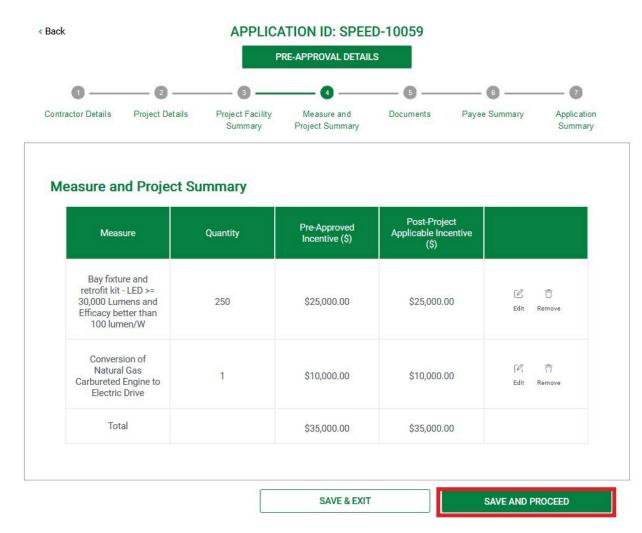
After reviewing these details, scroll down to enter the actual costs of the project (see screenshot below). Once complete, click "Get Calculated Values" and the correct incentive based on this information will be calculated.

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Once you click "Get Calculated Values" the correct incentive based on this information will be calculated. You will then need to click "Update Measure" and the colour will change from light green to white.



At this point, click "Save & Proceed" to continue to the next step.

**Application Tip:** Regardless of the changes you make in the Post-Project application the total project incentive cannot increase by more than 5% compared to the pre-approved incentive. If changes beyond 5% are needed, a Change Request should be submitted and approved prior to starting the Post-Project application. Approval of incentive increases beyond 5% of the pre-approved incentive will be subject to review, approval, and availability of Program funds.

#### 3.5 Documents

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On this page you will be required to upload documents, such as Invoices, proof of payment, and emission measurements for the Eligible Project.

**Step 8:** Drag and drop or click within the grey region to select documents relevant to the Eligible Project. Documents previously uploaded will be displayed below.

#### **Documents**

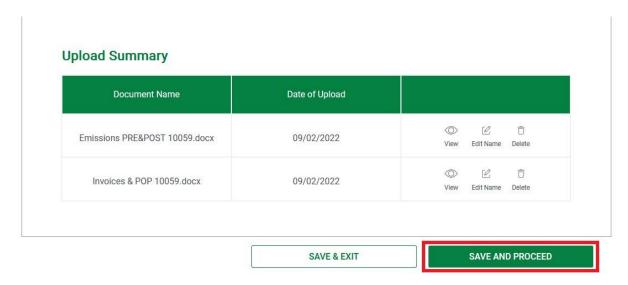


#### **Documentation Instructions**

Please review the instructions below before uploading files to ensure all the required documents are attached to the application:



**Application Tip:** If you have an AFR project, a new engine project or an engine upgrade project, this is where you will upload the SPEED Emissions Measurement Reporting Template and the supporting documentation for the emissions measurements and calculations. Please label and save the file names so that they are easy to identify.



The uploaded documents will appear under Upload Summary where the Participant has the option to View, Edit Name, or Delete the uploaded document. Previously uploaded documents cannot be deleted at this stage.

#### **Application Tips:**

- The documents required will differ by the Eligible Measure. At a minimum, all Applications will require a cost quote/invoice at the post-project application stage. The cost quote/invoice should clearly identify the date the invoice was paid, 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.
- If you have questions about what documents you need, please contact us at speed@esbprogram.ca

Step 9: Once all documents have been uploaded, click 'Save And Proceed' to go to the next page.

**Contractor Application Tips:** if you are the Contractor filling in the information on the Participants behalf, the Participant will be notified once you click 'Save and Inform Participant' and the Participant can review and submit the application.

#### 3.6 Consent to Pay

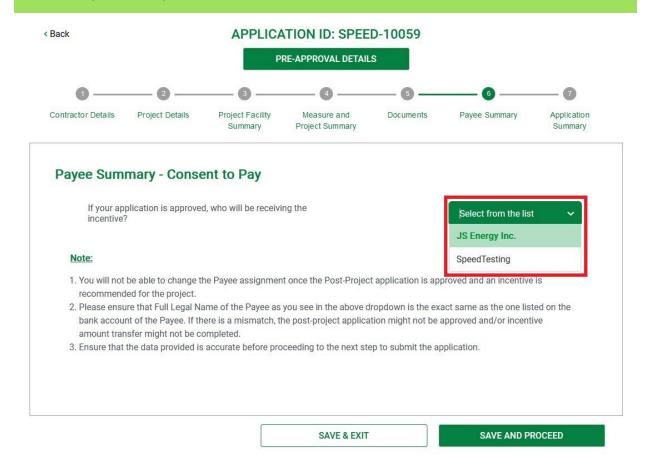
W W W W



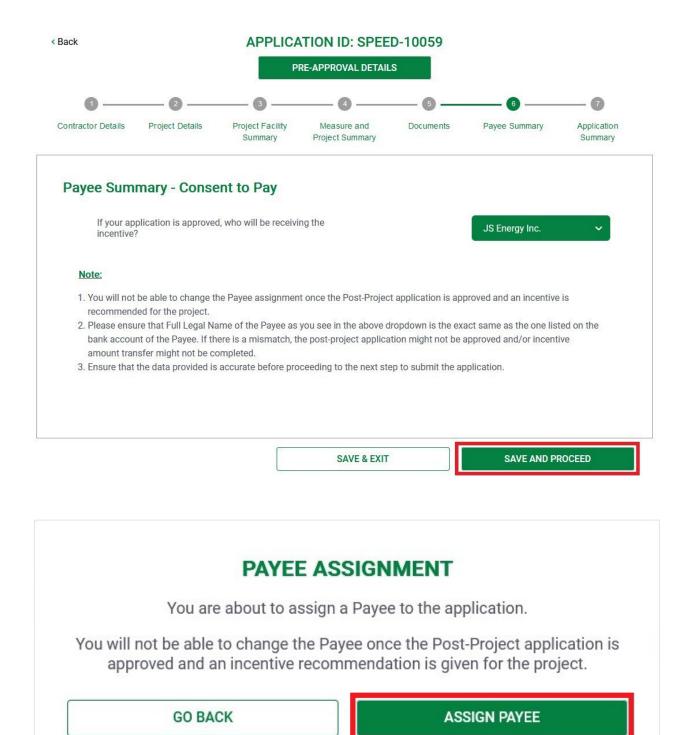
**Step 10:** Select either the Participant OR the Contractor to receive the Incentive Payment. You will not be able to proceed until this selection is made.

#### **Application Tip:**

- The Participant can choose to assign the payment to either themselves or to have the ESB program direct the payment to the Contractor listed on the application directly.
- Only the Participant can make this choice.



**Step 11:** Once the Payee has been selected, click 'Save & Proceed' to go to the next page. Note that the Payee cannot be changed once the Post-Project Application has been submitted.



**Step 12:** Please click "Assign Payee" to confirm the selection.

## 3.7 Application Summary



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

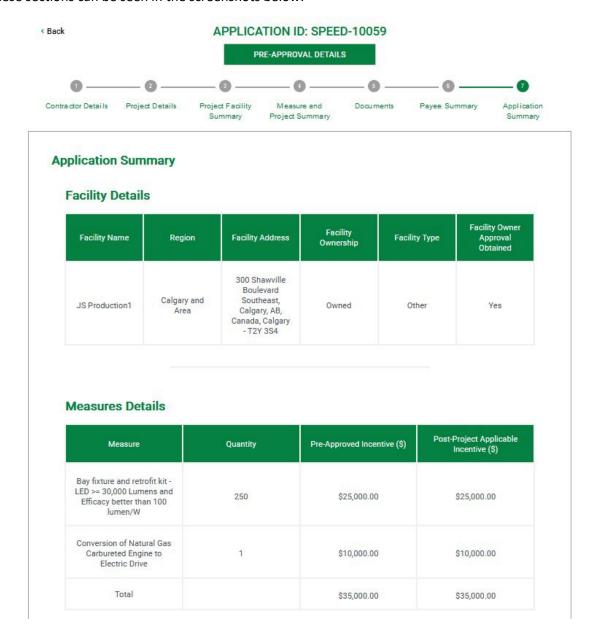
- Facility Details
- Measure Details
- Document Summary

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Project Summary

These sections can be seen in the screenshots below:



## **Documents Summary**

Document Name	Date of Upload	View
Emissions PRE&POST 10059.docx	09/02/2022	0
Invoices & POP 10059.docx	09/02/2022	•

# **Project Summary**

Contractor Name	SpeedTesting
Application Name	Engines2
Estimated Project Start Date	03/31/2022
Estimated Date of Project Completion	05/21/2022
Actual Project Completion Date	06/30/2022
Is the project receiving other funding, financial incentives, grants or subsidies?	No
Amount of eligible expenses incurred Prior to Application Submission	\$0.00

# Payee Summary

Payee Full Legal Name	JS Energy Inc.
Payee Address	330 Shawville Blvd SE, Calgary, Alberta - T2Y 4H3
Payee Contact Name	Jon Smith
Phone	+1 (403) 222-2222

#### Requirements for Submission

The Applicant represents and warrants as follows:

- This Post-Project Application is being submitted pursuant to the Participant Acceptance and subject to the <u>Terms</u> and <u>Conditions</u> thereof.
- The Participant represents and warrants that all information contained in this Post-Project Application is complete, true and accurate.
- 3. 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.
- 4. The Participant confirms that the Measures set out in this Post-Project Application meet the requirements to be Eligible Measures, and that the project meets the requirement to be an Eligible Project.
- 5. The Participant confirms that the Eligible Project was installed at the Eligible Facility.
- 6. The Participant confirms that the Eligible Project only contains Eligible Expenses.

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

**SAVE & EXIT** 

SUBMI

**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.

# SUBMIT DETAILS

You are about to submit your Post Project Application as a participant of the Small Producer Energy Efficiency Deployment program.

Please confirm that the details you have submitted are accurate.

GO BACK & REVIEW DETAILS

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SUBMIT DETAILS

**Step 12:** Click 'Submit Details' and when prompted with a confirmation dialogue box, click 'Yes' to submit the application.

Congratulations! The Post-Project Application is complete and will 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 speed@esbprogram.ca.

You will be redirected to the account page to view the status of your submitted projects, submit a new project, or log out.

