



# ENERGY SAVINGS FOR BUSINESS

*Investing to keep businesses competitive*



**Post-Project Application Instructions**

May 25, 2021



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## 1. Introduction & Purpose

The Energy Savings for Business Program uses a Program Portal, which is accessible at [www.ESBProgram.ca](http://www.ESBProgram.ca), 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 [Program Portal](#), and refer to the following documents on the [Program Resources](#) webpage:

- 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: [support@esbprogram.ca](mailto:support@esbprogram.ca)

Chat: via [eralberta.ca/esb](http://eralberta.ca/esb)

Toll-free: 844-407-0025

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## 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

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

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### 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 “Post-Project Applications” to begin.

**Step 1:** Find the Post-Project Application to be submitted and click ‘Complete Application’.

The screenshot shows the 'Applications Overview' page. At the top, there is a navigation bar with 'Applications Overview' and a dropdown menu. The dropdown menu is open, showing options: 'Post-Project Applications' (highlighted in green), 'Pre-Project Applications', 'Pre-Approval Applications', and 'Post-Project Applications' (highlighted in green). A red circle highlights the 'Post-Project Applications' option in the dropdown. Below the dropdown is a search bar labeled 'Search for Applications'. To the right of the search bar is a 'START AN APPLICATION' button. Below the search bar are two application cards. The first card is for 'Application #ESB-10181' with details: Contractor Name: Dev Energy Consulting Services Inc., Application Name: Parking Lot Lighting, Stage: Post-Project, Status: Application Draft, and a 'Complete Application >' button. The second card is for 'Application #ESB-10179' with details: Contractor Name: Dev Energy Consulting Services Inc., Application Name: Warehouse Lights, Stage: Post-Project, Status: Application Draft, and a 'Complete Application >' button.

This is a close-up of the application card for 'Application #ESB-10179'. The details are: Contractor Name: Dev Energy Consulting Services Inc., Application Name: Warehouse Lights, Stage: Post-Project, Status: Application Draft, and a 'Complete Application >' button. A red box highlights the 'Complete Application >' button.

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## START POST-PROJECT REVIEW

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

If you wish to add or change measures, apply for an extension or request an incentive increase of more than 10% of the pre-approved incentive, please go back and submit a Change Request.

If you require assistance, please email [support@esbprogram.ca](mailto:support@esbprogram.ca)

If you start a Post-Project review, the **Change Request** functionality will be disabled.

NO CHANGE REQUIRED

GO BACK

**Application Tip:** If you need to submit a Change Request, please view our Change Request Instructions on our Program Resources page for assistance.

## START POST-PROJECT REVIEW

### 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, as detailed out in [Application Guidebook](#)
- 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

START POST-PROJECT

GO BACK

## START POST-PROJECT REVIEW

This will start post-project review process for Application ID #ESB-10157. Are you sure?

YES, START APPLICATION

GO BACK

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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.

[< Cancel Application](#)

**APPLICATION ID: ESB-10157**

**PRE-APPROVAL DETAILS**

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### Contractor Details

Who is your contractor? Advantek Lighting Inc. ▼

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 submit the application after the application is filled.
2. Ensure that the data provided is accurate before submitting the application.

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### 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'.

#### Project Details

Application (or) Project Name	Measure - Energy Star ID Check	<a href="#">i</a>
Estimated Project Start Date	03/02/2021	<a href="#">i</a>
Estimated Date of Project Completion	03/31/2021	<a href="#">i</a>
Actual Project End Date	08/08/2021	
Has the project received other funding, financial incentives, grants or subsidies?	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>	<a href="#">i</a>
Sources of all other funding, financial incentives, grants and subsidies	<input type="text" value="Share names of your sources separated by a comma"/>	<a href="#">i</a>
Total Amount of all other funding, financial incentives, grants or subsidies	<input type="text" value="\$ 25,000"/>	

[SAVE & 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.

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### 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.

#### Project Facility Summary

Facility Name	Region	Facility Address	Facility Ownership	Facility Type	Facility Owner Approval Obtained
Summer Hill Condos	Edmonton and Area	30 Commercial Road Edmonton, Alberta M4G 1Z4	Leased	Other	Yes

**SAVE & PROCEED**

**Application Tip:** The facility details cannot be changed. If you see that they are incorrect, please contact [support@esbprogram.ca](mailto:support@esbprogram.ca) 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.
- If you have new measures, please create a new application as new measures cannot be added at this stage.

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## Measure and Project Summary

Measure	Quantity	Emissions Reduction (tonnes)	Pre-Approved Incentive (\$)	Post-Project Applicable Incentive (\$)	
LED Exit Sign	20	44.9	\$ 3,000	\$ 0.00	 Update  Remove
5 HP Fan Motor	1	37.1	\$ 1,500	\$ 1500.00	 Edit  Remove
<b>Total</b>		<b>82.0</b>	<b>\$ 4,500</b>	<b>\$ 0.00</b>	

**Note:** There are measures attached to the application that have certain details pending. Please update the highlighted measures in the table to proceed to the next step.

SAVE & PROCEED

**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.

< Back
Application ID #ESB00125

1 2 3 4 5 6

### Measure and Project Summary

Measure	Quantity	Emissions Reduction (tonnes)	Estimated Incentive	Estimated Energy Savings (kWh)
Water Heating	20	44.9	\$ 300	78,840 kWh
5 HP Fan Motor	1	37.1	\$ 150	65,000 kWh
<b>Total</b>		<b>82.0</b>	<b>\$ 450</b>	<b>143,840 kWh</b>

### ADD A MEASURE

Measure Category ⓘ  
Water Heating

Measure Type  
Condensing Tankless Water Heater

Measure  
Condensing Tankless Water Heater 75...

### MEASURE SPECIFIC INFORMATION


Quantity

Equipment and Material Costs

Labour Costs

Design Costs

Measure Incentive

Program Logo (Optional)  
 Select from computer (or) Drag and Drop to upload.

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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.

### Measure and Project Summary

Measure	Quantity	Emissions Reduction (tonnes)	Estimated Incentive	Estimated Energy Savings (kWh)
Water Heating	20	44.9	\$ 300	78,840 kWh
5 HP Fan Motor	1	37.1	\$ 150	65,000 kWh
<b>Total</b>		<b>82.0</b>	<b>\$ 450</b>	<b>143,840 kWh</b>

Developed by Enerva Energy Solutions Inc.

\$ 800,000

Incentive Per Unit

\$ 9.00

Measure Incentive - Water Heater Info

\$ 1,350,000

Maximum Eligible Measure Incentive - Water Heater Info

\$ 400,000

Total Eligible Measure Incentive - Water Heater Info

\$ 400,000

Actual Project Equipment and Material Costs

\$ 15,000

Actual Project Labour Costs

\$ 700,000

Actual Project Design and Other Costs

\$ 350,000

Actual Total Project Cost Info

\$ 350,000

**GET CALCULATED VALUES**

### Measure and Project Summary

Measure	Quantity	Emissions Reduction (tonnes)	Pre-Approved Incentive (\$)	Post-Project Applicable Incentive (\$)	
LED Exit Sign	20	44.9	\$ 3,000	\$ 3,000	<span style="margin-right: 10px;">✎ Edit</span> <span>🗑 Remove</span>
5 HP Fan Motor	1	37.1	\$ 1,500	\$ 1,500	<span style="margin-right: 10px;">✎ Edit</span> <span>🗑 Remove</span>
<b>Total</b>		<b>82.0</b>	<b>\$ 4,500</b>	<b>\$ 4,500</b>	

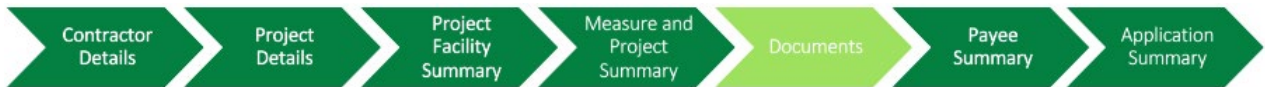
**SAVE & PROCEED**

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

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**Application Tip:** Regardless of the changes you make in the Post-Project application the total project incentive cannot increase by more than 10% compared to the pre-approved incentive. If changes beyond 10% are needed, a Change Request should be submitted and approved prior to starting the Post-Project application. Approval of incentive increases beyond 10% of the pre-approved incentive will be subject to review, approval, and availability of program funds.


### 3.5 Documents



On this page you will be required to upload documents, such as Invoices, Quotes and Specification Sheets 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



Select from computer (or) Drag and Drop files to upload.

Acceptable file types: .JPEG, .PNG, .PDF, .Docx







#### Documentation Instructions

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





<b>Invoices</b>	▼
The invoice should include the following:	
<ul style="list-style-type: none"><li>Participant name as declared in the application system during pre-project application</li><li>Participant address</li><li>Contractor name</li></ul>	
Proof of Payments	▼
Micro-generation Agreement (for Solar PV, CHP or WER)	▼
Electrical Safety Permits (for Solar PV, CHP, WER or GSHP)	▼
Other Documents	▼

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## Upload Summary

File Name	
PIC.0124.Whatsapp.jpeg	 View  Edit Name  Remove
invoice.0124.pdf	 View  Edit Name  Remove

## Pre-Project Document Summary

File Name	
PIC.0123.Whatsapp.jpeg	 View  Edit Name
invoice.0123.pdf	 View  Edit Name

SAVE & PROCEED

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.*
- *To view detailed measure specific information required for each measure, please view the Measures List and Measure Application Checklists on our website [Program Resources](#) page.*

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

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**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



**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.

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APPLICATION ID: ESB-10157

PRE-APPROVAL DETAILS

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### Payee Summary

If your application is approved, who will be receiving the incentive?

**Note:**

1. You will not be able to change the Payee assignment once the Post-Project Application is recommended for the project.
2. Please ensure that Full Legal Name of the Payee as you see in the above dropdown is the exact same as the one listed on the bank account of the Payee. If there is a mismatch, the post-project application might not be approved and/or incentive amount transfer might not be completed.
3. Ensure that the data provided is accurate before proceeding to the next step to submit the application.

Assign Payee to Application ▾

Enerva Energy Solutions Inc.

Advantek Lighting Inc.

SAVE & PROCEED

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**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.

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**APPLICATION ID: ESB-10157**

PRE-APPROVAL DETAILS

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### Payee Summary

If your application is approved, who will be receiving the incentive?

Enerva Energy Solutions Inc. ▾

**Note:**

1. You will not be able to change the Payee assignment once the Post-Project application is approved and an incentive is recommended for the project.
2. Please ensure that Full Legal Name of the Payee as you see in the above dropdown is the exact same as the one listed on the bank account of the Payee. If there is a mismatch, the post-project application might not be approved and/or incentive amount transfer might not be completed.
3. Ensure that the data provided is accurate before proceeding to the next step to submit the application.

SAVE & PROCEED

### PAYEE ASSIGNMENT

You are about to assign a Payee to the application.

You will not be able to change the Payee once the Post-Project application is approved and an incentive recommendation is given for the project.

ASSIGN PAYEE

GO BACK

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

### 3.7 Application Summary



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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
- Project Summary

These sections can be seen in the screenshots below:

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## Application ID #ESB00125

PRE-APPROVAL DETAILS

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 2 — 
 3 — 
 4 — 
 5 — 
 6 — 
 7

### Application Summary

#### Facility Details

Facility Name	Region	Facility Address	Facility Ownership	Facility Type	Facility Owner Approval Obtained
Summer Hill Condos	Edmonton and Area	30 Commercial Road Edmonton, Alberta M4G 1Z4	Leased	Other	Yes

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#### Measures Details

Measure	Quantity	Emissions Reduction (tonnes)	Pre-Approved Incentive (\$)	Post-Project Applicable Incentive (\$)
LED Exit Sign	22	52.1	\$ 3,000	\$3,300
5 HP Fan Motor	1	37.1	\$ 1,500	\$1,500
<b>Total</b>		82.0	\$ 4,500	\$ 4,800

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## Documents Summary

Document Name	
PIC.0123.Whatsapp.jpeg	 View
invoice.0123.pdf	 View

## Project Summary

Contractor Name	Advantek Lighting Inc.
Application Name	ABESBCRA125
Estimated Project Start Date	02/02/2021
Estimated Date of Project Completion	06/02/2021
Actual Project Completion Date	07/02/2021
Is the project receiving other funding, financial incentives, grants or subsidies?	Yes
Sources of all other funding, financial incentives, grants and subsidies (Optional)	RBC Bank, BER Program
Total Amount of all other funding, financial incentives, grants or subsidies (Optional)	\$ 400,000
Amount of Eligible Expenses incurred Prior to Application Submission	\$ 200,000

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## Payee Summary

Payee Full Legal Name	Advantek Lighting Inc.
Payee Address	3420, South Millway, Edmonton, Alberta - M4G 1Z4
Payee Contact Name	Anirudh Challa
Phone	780-813-4019

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## Requirements for Submission

The Applicant represents and warrants as follows:

- 1 This Post-Project Application is being submitted pursuant to the Participant Acceptance and subject to the [Terms and Conditions](#) thereof.
- 2 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

SUBMIT

**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.

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## SUBMIT DETAILS?

You are about to complete your Post Project Application 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 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 [support@esbprogram.ca](mailto:support@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.

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