



# STRATEGIC ENERGY MANAGEMENT FOR INDUSTRY

## Capital Retrofits Fixed Intake Application Guidelines

For project submitted between January 7 and March 2, 2026

Capital Retrofit applications received and approved (i.e., Capital Retrofit Terms and Conditions signed by ERA) before January 6 at 4 p.m. MST will be processed following the first-come, first-served model and will not be subject to the fixed intake evaluation process described below. Submitting a Capital Retrofit application before the January 6 deadline does not guarantee funding.

Any Capital Retrofit applications that do not have ERA-executed agreements by January 6, 4 p.m. MST will be included within the fixed intake evaluation process described below. Applications missing critical information or requiring clarifications must be revised by March 2, 2026.

## STEP 1: SUBMIT A CAPITAL RETROFIT APPLICATION (JANUARY 7 – MARCH 2, 2026)

- ▶ Use the SEMI portal to submit your Capital Retrofit application. The application window is open between January 7 and March 2, 2026. All submitted applications will be reviewed and ranked. See our evaluation criteria on the [SEMI website](#). The application should be supported by the following documents:
  - ▶ A feasibility study that describes the existing system, the proposed retrofit and the estimated energy savings/GHG emissions reduction.
  - ▶ A minimum of 12 months of energy consumption data for the applicable system(s) in Excel format.
  - ▶ A detailed budget for the Capital Retrofit cost estimate supported by vendor quotes for major cost items.
  - ▶ A retrofit implementation schedule including important milestones.
  - ▶ A detailed plan for how the energy savings/GHG emissions reduction will be estimated after the project is completed.
  - ▶ A description of the other benefits of project implementation including increased productivity, reduced maintenance, reduced waste, additional job creation etc.
  - ▶ A customer-executed Capital Retrofit Terms and Conditions.
- ▶ For the Capital Retrofit application, you may need to select Eligible Contractor(s) to:
  - ▶ Include in your application.
  - ▶ Implement the Capital Retrofits in your facility.
  - ▶ Certify successful installation and operation of Capital Retrofits in your facility.
  - ▶ Provide Measurement and Verification Reports (M&VR) as per the SEMI program requirements.

 **Tip: Any qualifying company can sign up as an Eligible Contractor on the SEMI portal.**

- ▶ Submit the necessary documentation for review by ERA's Service Provider. Any missing information will impact the quality of your application review and the ranking. Contact ERA's Service Provider for any questions: [semi@enerva.ca](mailto:semi@enerva.ca).
- ▶ After you click the submit button, you will receive an acknowledgement e-mail stating that your application has been submitted and is under review.



**Tip: Your Eligible Contractor can help fill out the Capital Retrofits application on your behalf.**

## STEP 2: APPLICATION REVIEW AND RANKING BY ERA'S SERVICE PROVIDER (MARCH 2 – MARCH 31, 2026)

- ▶ ERA's Service Provider will review the submitted documents to confirm the amount of energy savings/GHG emissions reduction, the retrofit cost estimate, and other details stated in the application. ERA's Service Provider may reach out to you to request any additional information required to complete the review. Please note that you are responsible for submitting a comprehensive application by March 2, 2026.
- ▶ The target date for completion of application review and issuing funding decisions is March 31, 2026. This date may be updated depending on the volume of applications received.

## STEP 3: NOTIFICATION OF FUNDING DECISION AND TERMS AND CONDITIONS EXECUTION (TARGET MARCH 31, 2026)

- ▶ The projects that are selected for funding will be notified by ERA's Service Provider.
- ▶ An executed Capital Retrofit Terms and Conditions will also be provided with the approval notification.
- ▶ Projects that are not selected for funding and/or projects submitted after March 2, 2026, will be notified and placed on a wait list. If funding becomes available, projects on the wait list will be contacted in order of ranking to assess if they can be completed by March 31, 2027.

## STEP 4: IMPLEMENT CAPITAL RETROFITS IN YOUR FACILITY

- ▶ Begin implementing the retrofits as per the scope outlined in the application documents. Projects can begin implementation before receiving the funding decision at their own risk. Funding is not reserved for projects before ERA's approval, which is granted with ERA's execution of the Capital Retrofit Terms and Conditions.
- ▶ Notify ERA's Service Provider in case of
  - ▷ Any changes in retrofit scope.
  - ▷ Any delays in the retrofit schedule.
  - ▷ Any factors leading to retrofit under-performance.
- ▶ Please note that any changes to project scope, schedule and performance estimates are subject to ERA approval.

## STEP 5: SUBMIT THE MEASUREMENT & VERIFICATION DATA AND GET YOUR RETROFIT VERIFIED

- ▶ Once your retrofit has been successfully installed and commissioned, verify the successful operation of your retrofit.
- ▶ The Eligible Contractor can perform a site inspection to ensure that the retrofit is:
  - ▷ Installed as per the scope outlined in your application; and
  - ▷ Operating as intended and generating savings.
- ▶ ERA's Service Provider will take pictures of the retrofit installation and collect the data as detailed in the M&VR document, to verify the energy savings and GHG emissions reductions achieved from the retrofit.
- ▶ Submit the documentation provided by the reviewer to the portal.
- ▶ Once ERA's Service Provider successfully reviews the documentation, you will get an automated e-mail notifying that your retrofit has been deemed in-service.
- ▶ Depending upon the nature of the retrofit, ERA's Service Provider will request the retrofit operating data as outlined in the M&VR document.
  - ▷ For stable systems with minimal seasonal variation (e.g. a variable frequency drive on a motor), the data submitted for in-service verification will be sufficient. ERA's Service Provider will not request any additional data.
  - ▷ For systems with seasonal variance (e.g. chillers), ERA's Service Provider will wait for a complete seasonal cycle before requesting the M&VR data.
  - ▷ For systems with a variable performance, ERA's Service Provider will wait for an entire year before requesting the M&VR data.

- ▶ If applicable, provide a description of any events that may have impacted the retrofit's performance.
- ▶ ERA's Service Provider will review the data to determine the savings achieved by your retrofit. ERA's Service Provider may reach out to you to request any additional information required to complete the review.
- ▶ If the data analysis shows that the retrofit has been underperforming, ERA's Service Provider will request additional data to track the cause of underperformance and will suggest any remedial measures.



**Tip: Your Eligible Contractor can submit post-activity deliverables on your behalf.**

## STEP 6: SUBMIT INVOICES AND RECEIVE INCENTIVE

1. Once ERA's Service Provider has determined that the retrofit is generating sufficient energy savings/GHG emissions reduction (5% of the baseline), you will be required to submit invoices for any eligible expenses.
2. List out all the eligible retrofit cost items in a worksheet.
3. Submit the worksheet in the SEMI portal along with supporting contractor and vendor invoices, details on in-kind contributions including supporting documents, and incentive invoice.
4. You will receive an automated e-mail upon successful submission of the invoices and completed worksheets.
5. Once ERA's Service Provider has reviewed the invoices, you will get an automated e-mail to provide your banking details.
6. Provide your banking details including a copy of void cheque. You will be notified to confirm the successful submission.
7. ERA's Service Provider will review your payment request. If the payment details you entered match the information on your void cheque, payment will be processed within four weeks. You can track the progress of your payment by visiting the portal.
8. Once the Retrofit savings have been verified and supporting documentation have been reviewed and approved, the Capital Retrofits incentive will be issued (up to \$1,000,000 per parent company). Payment will be issued via electronic funds transfer.



**Tip: Your Eligible Contractor can help submit required information on your behalf.**