



Beacon microFIT Supplier

Digital User Guide
Contract Assignments



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Getting Started

Disclaimer

This document shall be used for guidance purposes only and does not amend the microFIT Contract or microFIT Rules under any circumstances. In the event of a discrepancy between this guidance document and the microFIT Contract or microFIT Rules, the microFIT Contract or microFIT Rules, as applicable, will prevail. Nothing in this document shall be binding on the IESO.

What is Beacon?

Beacon is a new tool that the IESO introduced in 2019 that enables you to manage all of your active microFIT Contracts online. Beacon consolidates all microFIT Contract information into one place and integrates the Contract management functions of the microFIT program, creating a single comprehensive and secure system that allows for accurate and efficient data management.

Beacon is used to view information, manage contractual obligations, and send and receive notifications for existing microFIT Contracts.

microFIT Program Roles

Beacon allows for the following microFIT Program Roles for the purpose of managing the microFIT contract as described below.

Beacon Program Roles

Role	Description
Supplier Approver	<p>The Supplier Approver is the microFIT Contract counterparty or an individual who has the authority to act on the behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to "you" and "your" throughout this user guide are references to a Supplier Approver.</p> <p>Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.</p>
Supplier Agent	<p>The Supplier Agent is an optional role assigned by the Supplier Approver in relation to a microFIT Contract. When assigned to a microFIT Contract, a Supplier Agent can view the microFIT Contract and related information and prepare certain types of requests for review and approval by a Supplier Approver.</p> <p>A Supplier Agent's actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.</p>

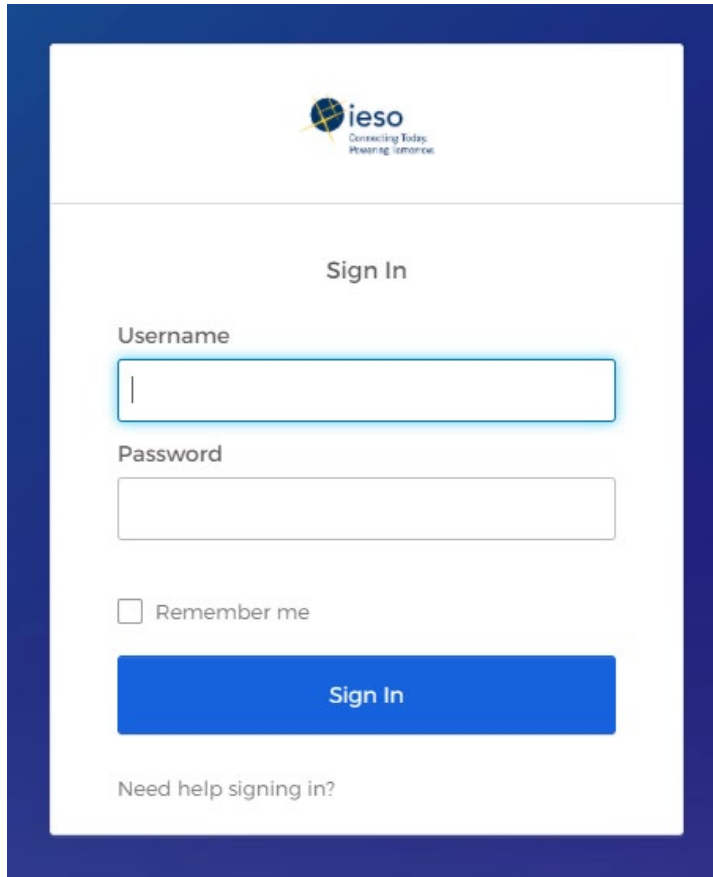
Role	Description
IESO	The IESO is represented by the Contract Management team that reviews, approves and/or rejects requests submitted by the Supplier Approver to the IESO. The IESO can also initiate certain requests that are to be reviewed by the Supplier Approver.

Sign in to Beacon

To begin managing your microFIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.

Procedure

1. Go to <http://www.ieso.ca/Get-Involved/microfit/login>.
2. Enter your account username (your email address) and password



The screenshot shows the IESO Sign In page. At the top is the IESO logo with the tagline "Connecting Today. Powering Tomorrow." Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. At the bottom of the form area, there is a link that says "Need help signing in?".

3. If you have set up multiple factors, you can choose which factor you will verify to login. Switch between factors by selecting the drop-down menu arrow next to the authentication icon. Please be aware that you are only required to verify one factor to login.

ieso
Connecting Today.
Powering Tomorrow.

SMS

SMS Authentication
(+1 XXX-XXX-XXXX)

Enter Code

Send code

Do not challenge me on this device again

Verify

Back to sign in

4. Once you have selected your factor, you will be prompted to provide the answer to your Security Question or your SMS/Voice Call Code. Type in the answer or code and click "Verify". **Please be aware that the answer is case sensitive.**

ieso
Connecting Today.
Powering Tomorrow.

?

Security Question

What is the food you least liked as a child?

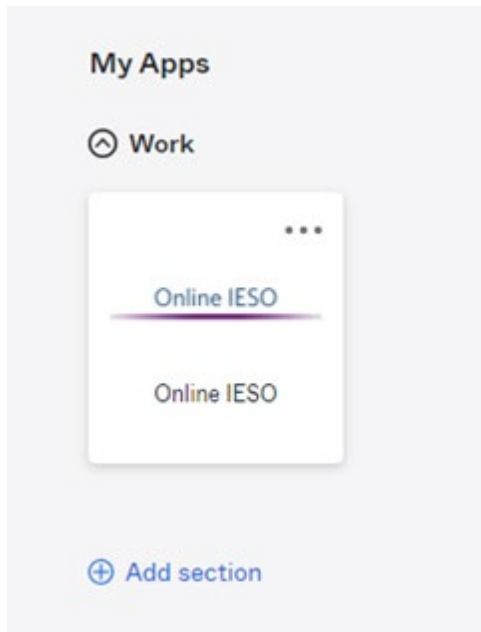
.....

Do not challenge me on this device again

Verify

Back to sign in

5. On your My Apps Dashboard, select the tile that says "Online IESO"



6. Next you will be brought to the Available Programs dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.

Welcome to the IESO Programs dashboard. Please select the program you wish to participate in below to proceed to the appropriate site.

FIT-microFIT Supplier



Start Supplier Request

*The Feed-In Tariff (FIT) Program was developed to encourage and promote greater use of renewable energy sources.
The microFIT Program supports the development of small or "micro" renewable electricity generation projects (10 kilowatts (kW) or less in size) such as solar panel installations.*

Retrofit



Register for Retrofit

The Retrofit program is designed to provide a variety of options for businesses, so you can find the right fit for your operations, regardless of your industry.


Contract Overview

Manage Contracts Page

On the **MANAGE CONTRACTS** page you'll see all of your Contracts.

You can search for Contracts by using these filters.

The screenshot shows the 'MANAGE CONTRACTS' page interface. At the top, there is a navigation bar with tabs for 'MY TASKS', 'REQUESTS', 'MANAGE SUPPLIERS', 'MANAGE CONTRACTS', and 'MANAGE PROFILE'. Below the navigation bar is a section for 'Available Action(s)'. The main area contains several filter fields: 'Contract Id' (text input), 'Contract Version' (dropdown), 'LDC' (dropdown), 'Locked By' (text input), 'Lock Status' (dropdown), 'Supplier Type' (dropdown), 'Supplier Id' (text input), 'Supplier Legal Name' (text input), and 'Contract Status' (dropdown). Below the filters is a pagination control showing 'Paging: 10 | 25 | 50 | Show All'. A table titled '2 Contracts' displays the following data:

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
 FIT-MABCDEF	microFIT	Executed	662121	John S Smith	Hydro One Networks Inc.	1.3

To see the status of the Contract, hover over the icon.

To see a Contract Record, select the **Business Contract ID**.

To see a Supplier Record, select the **Supplier ID**.

Select any header to sort your Contracts by those criteria.

Contract Record Overview

When you select a **Contract ID**, this brings you to the Contract Record's **Summary** page.

If there is an active Request or a draft related to a Contract, the Record will be locked.

To see all the active and closed Requests that are related to the Contract, select the **Request** tab.

To see the available actions that you can take, select the **Related Actions** tab.

To view and download documents related to the Contract, select the **Documents** tab.

To download your Contract, select **Download Contract**.

Contract: FIT-MABCDEF DOWNLOAD CONTRACT

Summary | Facility Information | Requests | Documents | Contacts | Pricing | Milestones | Related Actions

RECORD LOCKED

Request ID	Request Type	Date Requested	Requested By
C8550	Change to Contract Notice Mailing Address	Dec 09, 2022 01:01 PM EST	Jon Snow

[Supplier Approver](#)

Contract FIT-MABCDEF

Contract Status: Executed

Contract Id: FIT-MABCDEF

Contract Version: 1.3

Contract Type: microFIT

Nameplate Capacity (KW): 10

Contract Price: 80.2

Supplier Legal Name: John S Smith

Supplier Id: 662121

LDC: Hydro One Networks Inc.

Contract Notice Mailing Address

120 Adelaide
Toronto, Ontario L0B 1B0
Canada.

Facility Address

120 Adelaide Street West,
Toronto, Ontario X1X 2X2
Canada.

The **Record Locked** table shows information about the Request that is locking the Contract. For more details, select the **Request ID**.

Managing Assignment Requests

Contract Assignment Requests

During the lifecycle of your microFIT Contract(s), there might be changes to the ownership of the project. After the prospective owner (the "Assignee") has registered a new Supplier, the current Supplier (the "Assignor") can submit a Contract Assignment Request. Once a Contract Assignment Request has been initiated by the Assignor, the Assignee must also complete certain actions in Beacon.

Once both the Assignor and Assignee have completed their respective tasks and the Contract Assignment Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Contract Assignment Request in Beacon.

Before you begin

Before a Supplier can assign a microFIT Contract, the following conditions must be completed:

- The Assignee must register for a Beacon account and register a Supplier.
- The Assignee must provide their Supplier ID and Supplier Legal Name to the Assignor.
- The Assignee must set-up a generator account with their Local Distribution Company.
- The Assignor must assign their Connection Agreement to the Assignee.
- The Assignee must be an Eligible Participant, as defined in the Eligible Participant Schedule.

Also, be sure to download any applicable Contract documents you would like to retain for your records, as these will no longer be available to you as the Assignor once the Contract Assignment Request is complete. Please refer to the Downloading and Saving Documents section at the end of this document for further details.

Related Topics

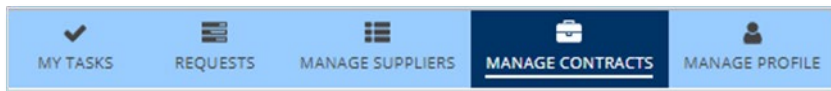
- To register a Supplier, check out *Registering a New Supplier*.

Initiating a Contract Assignment Request (Assignor)

Procedure

Note: Be sure to download any applicable Contract documents you would like to retain for your records, as these will no longer be available to you as the Assignor once the Contract Assignment Request is complete. Please refer to the Downloading and Saving Documents section at the end of this document for further details.

1. Select the **MANAGE CONTRACTS** tab.




2. **Optional:** Use the filters to find a Contract that you want to initiate the Contract Assignment Request for.

Contract Id <input type="text" value="Enter partial text to search Contract Id"/>	Supplier Type ----- Show All -----
Contract Version ----- Show All -----	Supplier Id <input type="text" value="Enter partial text to search Supplier Id"/>
LDC ----- Show All -----	Supplier Legal Name <input type="text" value="Enter partial text to search Supplier Legal Name"/>
Locked By <input type="text" value="Request Id or DRAFT"/>	Contract Status ----- Show All -----
Lock Status ----- Show All -----	

Paging: 10 | 25 | 50 | Show All

3. Select the **Business Contract ID** to view the Contract that you want to assign.

	Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name
	FIT-MABCEDEF	microFIT	Executed	757373	John Smith

4. Select **Related Actions > Contract Assignment**.

Summary Facility Information Requests Documents Notes Contacts Pricing Milestones **Related Actions**

- Change to Contract Notice Mailing Address**
Use this request type to update the Contract Contact & Notice Information.
- Change to Facility Information**
Use this request type to update Facility Information.
- Contract Assignment**
Use this request type to assign a contract to another Supplier
- Termination**
Use this request type to terminate your Contract.

5. Choose a reason for the Request, and then enter the reason for submitting the change.

6. Choose a proposed effective date, and then select **NEXT**.

Note: The proposed effective date must be a present or future date.

Submit Contract Assignment

Request Contract Assignment

Contract ID: FIT-MABCDEF

Reason for Request *

----- Please Select -----

Describe Reason for Change

0 out of 4000 characters entered: 4000 remaining.

Proposed Effective Date *

mm/dd/yyyy

CANCEL REQUEST **NEXT >**

7. Verify the Supplier and Person information on the Verify Assignor Information page. If the information is correct, select **Y**. If the information is incorrect, select **CANCEL REQUEST**, and then correct the information before you proceed with the Contract Assignment Request.

Note: You must confirm that the information is correct to continue.

Verify Supplier Information

I, John Smith, certify that the information below is correct [CONFIRMED] *

Y N

John Smith [microFIT-757373] [CONFIRMED]

Supplier Legal Name: John Smith	GST/HST Registrant? <input checked="" type="radio"/> Yes <input type="radio"/> No
Supplier Id: 757373	
Supplier Type: microFIT	
Legal Entity Type: Individual	
Non-Resident of Canada? <input type="radio"/> Yes <input checked="" type="radio"/> No	

Verify Person Information

I, John Smith, certify that the information below is correct [CONFIRMED] *

Y N

John Smith [CONFIRMED]

Person Name: John Smith	Address
Person Id: 959137	44 North St.
Account Id: john.smith@yopmail.com	Wawa, Ontario N1N 1N1
	Canada
	Main Phone
	(416) 967-1111
	Primary Email
	John.Smith@yopmail.com

CANCEL REQUEST **NEXT >**

8. Select **NEXT**.

9. Verify the Contract information on the Verify Contract Information page. If the information is correct, select Y. If the information is incorrect, select **CANCEL REQUEST**, and then correct the information before you proceed with the Contract Assignment Request.

Note: You must confirm that the information is correct to continue.

Verify Contract Information

I, John Smith, certify that the information below is correct [CONFIRMED] *

Y N

Contract Notice Address [CONFIRMED]

Address

88 Gadr st.
Kabul 65465
Afghanistan

CANCEL REQUEST < BACK NEXT >

10. Select **NEXT**.

11. On the Identify Assignee page, enter the Supplier ID and Supplier Legal Name for the Supplier you want to assign the Contract to, and then select **FIND SUPPLIER**.

Note: The Assignee must be a verified Supplier.

The Supplier ID and Supplier Legal Name should be provided to you directly from the Assignee. The Assignee is provided with a Supplier ID once they have completed the Supplier Registration process.

The Assignee's Supplier ID# and Supplier Legal Name must be entered EXACTLY as it appears on the Assignee's Beacon account. Be mindful that any extra spaces or characters will prevent the tool from finding the Assignee.

Verify Assignor Information > Verify Contract Information > Identify Assignee > Verify Requirements > Upload Supporting Documents > Review

Identify Assignee

Supplier Id: 531340 Supplier Legal Name: ABC Joint Venture

FIND SUPPLIER

Supplier Overview

Supplier Legal Name: ABC Joint Venture Supplier Type: microFIT
Supplier Id: 531340 Legal Entity Type: Joint Venture - No Legal Personality

CANCEL REQUEST < BACK NEXT >

12. Select **NEXT**.

13. On the Verify Requirements page, confirm that the Assignor requirements have been met, and then select **NEXT**.

The screenshot shows the 'Verify Requirements' page with a breadcrumb trail: Verify Assignor Information > Verify Contract Information > Identify Assignee > **Verify Requirements** > Upload Supporting Documents > Review. The main content area is titled 'Assignor Requirements' and contains a table with the following rows:

	Requirement Met?	
Assignee has provided their Supplier Legal Name and Person ID to the Assignor	<input checked="" type="radio"/> Yes <input type="radio"/> No	REQUIRED
Assignee has registered as a Supplier	<input checked="" type="radio"/> Yes <input type="radio"/> No	REQUIRED
Connection Agreement has been assigned to the Assignee	<input checked="" type="radio"/> Yes <input type="radio"/> No	REQUIRED
Other Supporting Documentation	<input checked="" type="radio"/> Yes <input type="radio"/> No	OPTIONAL

At the bottom left is a 'CANCEL REQUEST' button. At the bottom right are '< BACK' and 'NEXT >' buttons.

14. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

The screenshot shows a modal window titled 'Supporting Documents [Empty - 1 Pending]'. It contains the following fields and controls:

- 'Select Document to Upload' section with an 'UPLOAD' button and a 'Drop file here' area.
- 'File size limit upto: 30 MB' text.
- 'Document Type *' dropdown menu with 'Please Select' as the current selection.
- 'Description' text area.
- '0 out of 200 characters entered: 200 remaining.' text below the description area.
- 'CANCEL' and 'ADD DOCUMENT' buttons at the bottom.

Note: When you submit a Contract Assignment Request, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, parcel register, land transfer documents, etc.). Any uploaded documents will be visible to both the Assignee and Assignor.

15. On the **Review** page, look over all your changes.

16. Ensure to check off all acknowledgments before completing the request.

Please Acknowledge: *

This Contract Assignment request is being submitted by me, and not by any third party representative on my behalf.

I am solely responsible for checking email messages and automated notifications from the IESO sent in relation to this Contract Assignment request.

I will notify the IESO of any breach of the representations and warranties made in the Contract Assignment, including any unauthorized access to my email address or access Credentials.

If you are ready to submit the Assignment Request, check this box and click the Submit Assignment Request button below. By checking this box and submitting this Assignment Request, I hereby declare that the information contained in this document and submitted to the IESO is true, complete and accurate.

By checking this box and submitting this Assignment Request, I hereby declare that the Connection Agreement has been transferred by me to the person to which contract is to be assigned.

I have read and understood the IESO's privacy policy (found at www.ieso.ca), and I consent to the collection, use and disclosure of my personal information as set out in the privacy policy. I represent and warrant to the IESO that, if I have disclosed a third party's personal information, including the personal information of the Assignor or Assignee, as applicable, I have the consent of the third party to disclose the personal information to the IESO.

[CANCEL REQUEST](#) [< BACK](#) [SUBMIT REQUEST](#)

17. Select **SUBMIT REQUEST**.

18. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.

Contract Assignment Request Submitted

Thank you! Your request has been submitted

[Request C4267](#)

[▶ Prepare Assignment Request - Submit](#)

Note: The Request now has a **Request ID** that you can use to track its progress

Related Topics

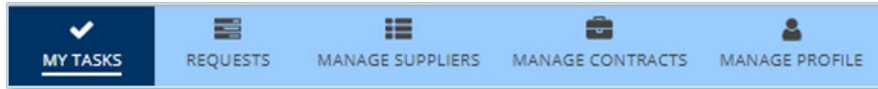
- To update incorrect or inaccurate information for you, check out *Changing Your Contact Information*.
- To update incorrect or inaccurate information for a Supplier, check out *Submitting a Request to Change a Supplier Record*.
- To update incorrect or inaccurate information on a Contract, check out *Submitting a Request to Change a Contract Record*.

Completing a Contract Assignment Request (Assignee)

If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on **the My Tasks** tab.

Procedure

1. Select the **MY TASKS** tab.



2. Select **Confirm Contract Assignment** for the Request that you want to review. This brings you to the **Request Information** page

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
C4267	Contract Assignment	[DRAFT]	Supplier	Confirm Contract Assignment	<input checked="" type="checkbox"/>

3. Review the information, write down the **Contract ID#**, and then select **NEXT**.

- Verify the Supplier and Person information on the Verify Assignee Information page. If the information is correct, select **Y**. If the information is incorrect, select **DECLINE ASSIGNMENT**, and then correct the information before you proceed with the Contract Assignment Request.

Note: You must confirm that the information is correct to continue.

The screenshot displays a web application interface for 'Verify Assignee Information'. The top navigation bar includes: Request Information, Verify Assignee Information (active), Enter Assignee Contract Information, Verify Requirements, Upload Supporting Documents, and Review.

Verify Supplier Information

I, John Smith, certify that the information below is correct *

Y N

John Smith [microFIT-757373]

Supplier Legal Name: John Smith	GST/HST Registrant? <input checked="" type="radio"/> Yes <input type="radio"/> No
Supplier Id: 757373	
Supplier Type: microFIT	
Legal Entity Type: Individual	
Non-Resident of Canada? <input type="radio"/> Yes <input checked="" type="radio"/> No	

Verify Person Information

I, John Smith, certify that the information below is correct *

Y N

John Smith

Person Name: John Smith	Address
Person Id: 959137	44 North St.
Account Id: john.smith@yopmail.com	Wawa, Ontario N1N 1N1
	Canada
	Main Phone
	(416) 967-1111
	Primary Email
	John.Smith@yopmail.com

DECLINE ASSIGNMENT

- Select **NEXT**.

6. On the **Enter Assignee Contract Information** page, enter your generator account information, facility name, and Contract notice mailing address.

Note: You must contact your Local Distribution Company and request to set up a new generator account, which is different from a consumption (load) account.

The screenshot shows a web form titled "Enter Assignee Contract Information" with a navigation bar at the top containing: Request Information, Verify Assignee Information, Enter Assignee Contract Information (active), Verify Requirements, Upload Supporting Documents, and Review. The form fields include:

- Bluewater Power Distribution Corporation Generator Account Name ***: Text input with placeholder "Enter your Supplier Legal Name" and a note "This should be the Supplier Legal Name - 'John Smith'".
- Bluewater Power Distribution Corporation Generator Account No ***: Text input.
- Facility Name ***: Text input.
- Contract Notice Mailing Address** section:
 - Street Address ***: Text input with placeholder "e.g. 120 Adelaide Street West, P.O. box".
 - Additional Mailing Information (optional)**: Text input with placeholder "Apartment, suite, unit, rural route, c/o".
 - Country ***: Dropdown menu with placeholder "Select Country".
 - City ***: Text input.
 - Postal Code ***: Text input.

At the bottom right, there are navigation buttons: "< BACK" and "NEXT >".

7. Select **NEXT**.

8. On the **Verify Requirements** page, confirm that the Assignee requirements have been met. If required pre-conditions aren't met, complete all of the pre-conditions before you proceed with the Contract Assignment Request.

The screenshot shows the 'Verify Requirements' step in a multi-step process. The steps are: Request Information, Verify Assignee Information, Enter Assignee Contract Information, **Verify Requirements**, Upload Supporting Documents, and Review. The 'Assignee Requirements' section contains a table with the following items:

	Requirement Met?	
Assignee is an Eligible Participant	<input type="radio"/> Yes <input type="radio"/> No	OPTIONAL
Assignee's Declaration	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED
Documents evidencing possession of land pursuant to the Indian Act (Canada) (including, where appropriate, a band council resolution)	<input type="radio"/> Yes <input type="radio"/> No	OPTIONAL
Parcel Register or Land Transfer Document	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED
Set-up Generator Account with LDC	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED

At the bottom right of the table, it says '5 items'. Below the table are '< BACK' and 'NEXT >' buttons.

9. Select **NEXT**.

10. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

The screenshot shows the 'Supporting Documents' upload form. It has a title 'Supporting Documents [Empty - 1 Pending]'. The form includes:

- 'Select Document to Upload' section with an 'UPLOAD' button and a 'Drop file here' area.
- 'File size limit upto: 30 MB'.
- 'Document Type *' dropdown menu with 'Please Select' as the current selection.
- 'Description' text area.
- '0 out of 200 characters entered: 200 remaining.' status.
- 'CANCEL' and 'ADD DOCUMENT' buttons at the bottom.

Note: When you submit a Contract Assignment Request, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, parcel register, land transfer documents, etc.).

11. On the **Review** page, choose either **Approve** or **Decline**.

- a. If you select **Approve**, you can enter an explanatory note or comment to provide additional context to the Contract Assignment Request, and then select **SUBMIT REQUEST**.
- b. If you select **Decline**, you can enter an explanatory note or comment to provide additional context to the Contract Assignment Request, and then select **DECLINE**.



Decision

Decision

Approve

Decline

Comment

0 out of 4000 characters entered: 4000 remaining.

< BACK

Once the Request is submitted, a confirmation page is displayed. The Request is now under IESO review. Please wait for further instructions from the IESO.

Related Topics

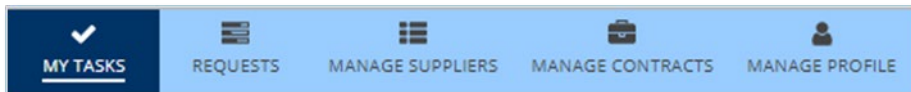
- To update incorrect or inaccurate information for you, check out *Changing Your Contact Information*.
- To update incorrect or inaccurate information for a Supplier, check out *Submitting a Request to Change a Supplier Record*.

Execute Agreement for a Contract Assignment Request (Assignee/Assignor)

Once the Assignor and Assignee have completed their tasks and the IESO has reviewed the submitted Contract Assignment Request and determined that requirements have been met and the assignment can proceed, a Contract Novation Agreement will be generated for the Assignor and the Assignee to review and accept.

Procedure

1. Select the **MANAGE TASKS** Suppliers tab.

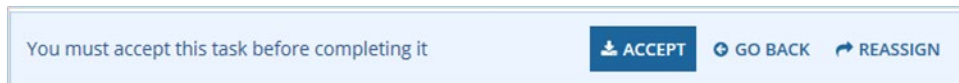


2. Select **Execute Agreement [Assignee/Assignor]** for the Request that you want to review.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
C6057	Contract Assignment	IESO Review	Supplier	Execute Agreement [Assignee]	<input checked="" type="checkbox"/>

This brings you to the **Execute Assignee/Assignor Agreement for Contract Assignment** page.

3. To begin working on the task, select **ACCEPT**.



- To review all relevant information including the generated Novation Agreement, select **View Novation Agreement**.
- Once you have reviewed the Novation Agreement and have chosen to accept the Contract Assignment, select **Execute Agreement – Assignee/Assignor**. Please carefully review and check off all of the acknowledgement statements in order to proceed.

Decision

Decision

Execute Agreement - Assignee

Decline Agreement

[View Novation Agreement](#)

Please Acknowledge: *

I have read and understood the terms and conditions of the microFIT Contract Assignment.

I attest that all the information in this microFIT Contract Assignment Agreement is true and accurate.

I understand my obligations as an Assignor/Assignee.

I accept the terms and conditions of the microFIT Contract.

I have read and understood the IESO's privacy policy (found at www.ieso.ca), and I consent to the collection, use and disclosure of my personal information as set out in the privacy policy.

I represent and warrant to the IESO that, if I have disclosed a third party's personal information, including the personal information of the Assignor or Assignee, as applicable, I have the consent of the third party to disclose the personal information to the IESO.

Note: Be sure to complete all acknowledgments in order to continue.

- Select **Execute Agreement - Assignee [Assignor]**.

I, Thomas Russell, have reviewed the agreement and provided all relevant documentation

EXECUTE AGREEMENT - ASSIGNEE

- Once both the Assignor and Assignee have individually completed the Execute Agreement task, it is returned to the IESO for a final review. If no further action is required, you will receive a notification from the IESO that provides the final outcome of the Request.

Contract Assignment Request Tasks

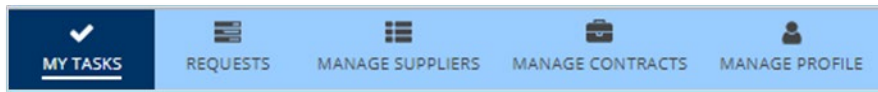
Reviewing Requests Submitted by a Supplier Approver

If you are a Supplier Approver for Suppliers or Contracts, you may receive a Supplier Approver Review Request task to review any Requests submitted by other Supplier Approvers of those Suppliers or Contracts.

If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

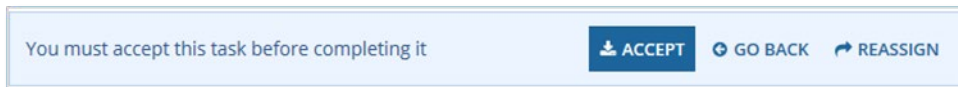
1. Select the **MY TASKS** tab.



2. Select the **Active Task** for the Request that you want to review. This brings you to the **Review** page.

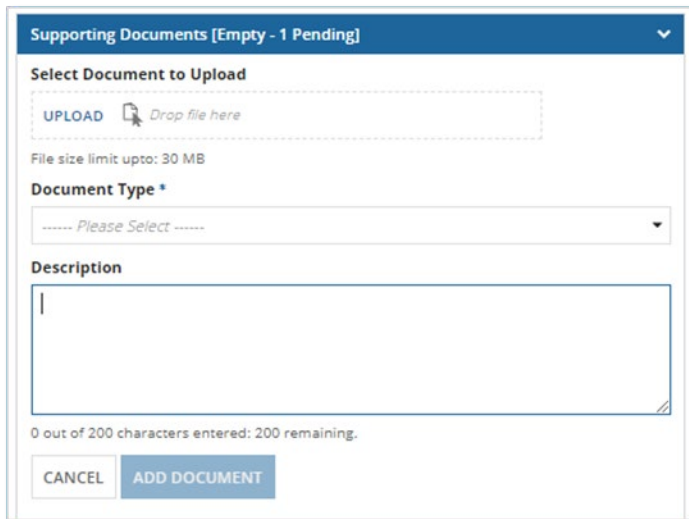
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

3. To begin working on the task, select **ACCEPT**.



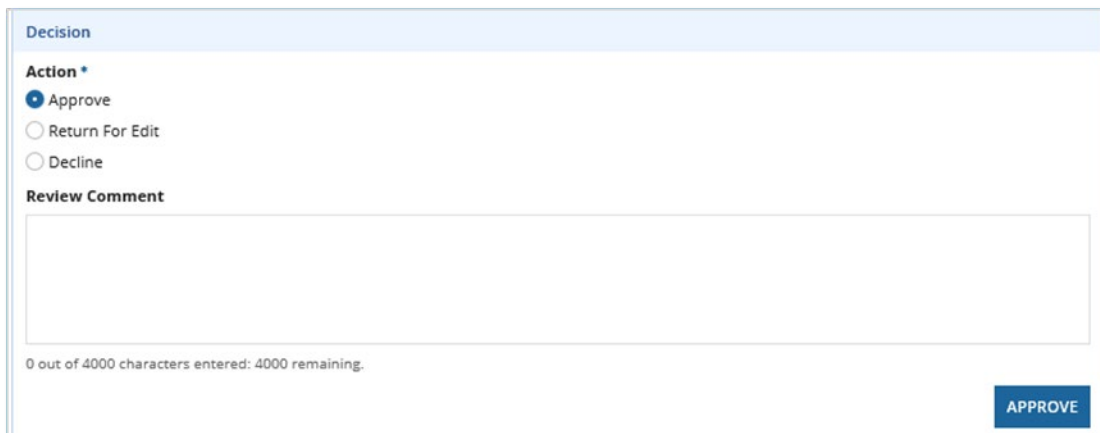
4. Review the values entered and the documents in the Request.

5. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



The screenshot shows a form titled "Supporting Documents [Empty - 1 Pending]". It includes a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" area. Below this is a "File size limit upto: 30 MB" note. The "Document Type" is selected via a dropdown menu showing "----- Please Select -----". A "Description" text area is present, with a character count at the bottom: "0 out of 200 characters entered: 200 remaining." At the bottom of the form are "CANCEL" and "ADD DOCUMENT" buttons.

6. Under Decision, choose either Approve, Return for Edit or Decline.
- If you select **Approve**, you can enter an explanatory note or comment to provide additional context to the review task, and then select **Approve**.
 - If you select **Return for Edit**, you can enter an explanatory note or comment to provide additional context to what needs clarification, and then select **Return for Edit**.
 - If you select **Decline**, you can enter an explanatory note or comment to provide additional context for why you declined the Request, and then select **Decline**.



The screenshot shows a form titled "Decision". It features an "Action *" section with three radio button options: "Approve" (selected), "Return For Edit", and "Decline". Below this is a "Review Comment" text area, with a character count at the bottom: "0 out of 4000 characters entered: 4000 remaining." An "APPROVE" button is located at the bottom right of the form.

7. A dialog box is opened, select **Yes**.

Depending on your decision, the Request may be under IESO review, returned to the Request initiator for edits, or the Request may be closed, respectively.

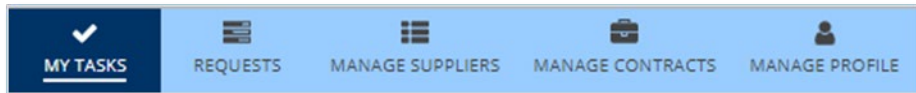
Providing Clarification for Returned Requests

The IESO or a Supplier Approver may return a Request that you submitted back to you for further review.

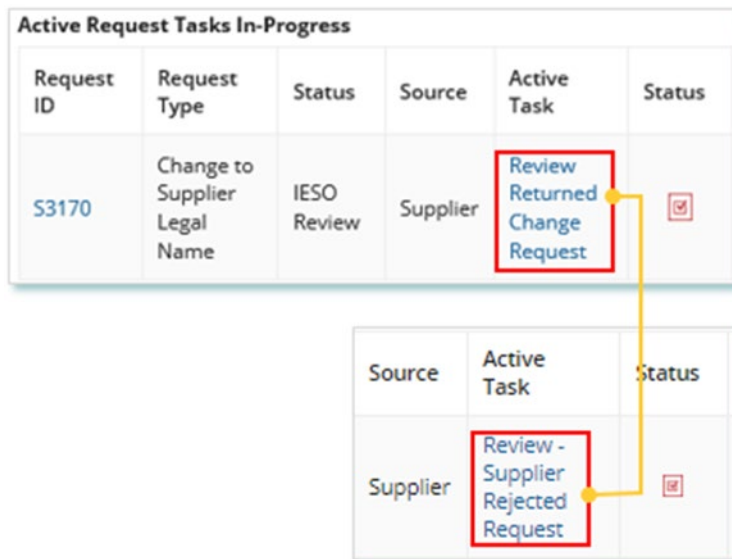
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

1. Select the **MY TASKS** tab.



2. Select the **Active Task** for the Request you want to work on.



The image shows a table titled 'Active Request Tasks In-Progress' with columns: Request ID, Request Type, Status, Source, Active Task, and Status. A red box highlights the 'Review Returned Change Request' task, and a yellow arrow points to a zoomed-in view of the task details below.

Request ID	Request Type	Status	Source	Active Task	Status
S3170	Change to Supplier Legal Name	IESO Review	Supplier	Review Returned Change Request	<input checked="" type="checkbox"/>

Source	Active Task	Status
Supplier	Review - Supplier Rejected Request	<input checked="" type="checkbox"/>

3. On each page, make changes to the fields that require updates.
4. On the **Supporting Documents** page, review any documents added by other users
5. **Optional:** To upload supporting documents, select **+UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.

Note: When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

6. Review the changes summarized on the **Review** page.
7. Under Decision, choose either Request Updated or Cancel.
 - a. If you select Request Updated, you can enter an explanatory note or comment to provide additional context on what was clarified, and then select **Request Updated**.

- b. If you select **Cancel**, you can enter an explanatory note or comment to provide additional context for why you cancelled the Request, and then select **Cancel**.

The screenshot shows a dialog box titled "Decision". It contains two radio buttons: "Request Updated" (which is selected) and "Cancel". Below the radio buttons is a text area labeled "Request Updated Comment". At the bottom left of the text area, it says "0 out of 4000 characters entered: 4000 remaining.". At the bottom right, there are two buttons: "BACK" and "REQUEST UPDATED".

8. A dialog box is opened, select **Yes**.

The screenshot shows a dialog box titled "Acknowledge?". It has a horizontal line for a response. At the bottom left, there is a button labeled "NO". At the bottom right, there is a button labeled "YES".

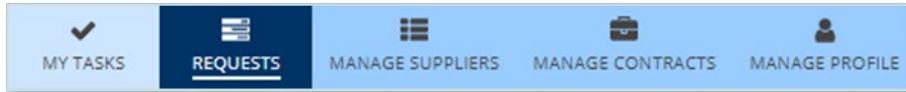
Cancelling a Submitted Request

You can cancel a Request that you submitted.

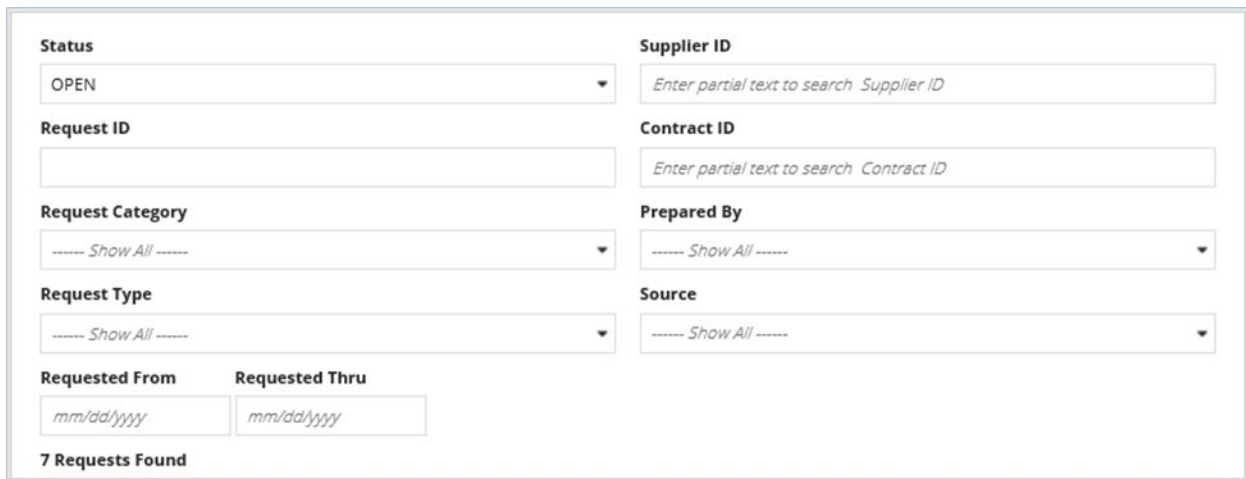
Note: You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

1. Select the **Requests** tab.



2. **Optional:** Use the filters to search for the Request that you want to cancel.

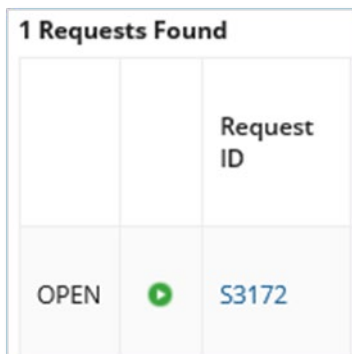


The screenshot shows a filter panel with the following fields:


- Status:** A dropdown menu with 'OPEN' selected.
- Supplier ID:** A text input field with the placeholder text 'Enter partial text to search Supplier ID'.
- Request ID:** A text input field.
- Contract ID:** A text input field with the placeholder text 'Enter partial text to search Contract ID'.
- Request Category:** A dropdown menu with '----- Show All -----' selected.
- Prepared By:** A dropdown menu with '----- Show All -----' selected.
- Request Type:** A dropdown menu with '----- Show All -----' selected.
- Source:** A dropdown menu with '----- Show All -----' selected.
- Requested From:** A date input field with the placeholder text 'mm/dd/yyyy'.
- Requested Thru:** A date input field with the placeholder text 'mm/dd/yyyy'.

At the bottom of the filter panel, it says '7 Requests Found'.

3. Select the **Request ID** to view the Request Record that you want to cancel.



The screenshot shows a table with the following data:

1 Requests Found		
		Request ID
OPEN		S3172

4. Select **CANCEL REQUEST**.

Supplier Request [S3172] CANCEL REQUEST

Summary Attachments Related Actions

Submitted IESO Review Closed

OPEN

5. On the **Confirm Cancellation of Request** page, enter the reason for cancelling the Request.

Confirm Cancellation of Request S3172

! Please confirm that you would like to cancel this request. You will lose all information and will not be able to recover the request.

+ Prepare Change Request - Submit

Time	Performed By	Role	Reason
Jul 16, 2019 10:27 AM EST	John Smith	Supplier Approver	Changing the Legal Name of the Supplier

Comment
Updating legal name

Request - Change to Supplier Legal Name >

Describe Reason for Cancelling Request *

0 out of 4000 characters entered: 4000 remaining.

BACK CANCEL REQUEST

6. Select **CANCEL REQUEST**.
7. A dialog box is opened, select **Yes**.

Are you sure?

NO YES

8. Refresh your page.

9. The Request status is now "CLOSED" and the outcome is "Cancelled".

Submitted IESO Review Closed

CLOSED

Close Request - Closed

Time	Performed By	Role	Reason
Jul 16, 2019 10:30 AM EST	SYSTEM - AUTO	IESO	

Comment
< No Comment >

Request - Change to Supplier Legal Name

Request ID: S3172	Supplier: ABC Joint Venture	Outcome: Cancelled
Request Type: Change to Supplier Legal Name	Supplier ID: 531340	Reviewed On: Jul 16, 2019 10:30 AM EST
Requested On: Jul 16, 2019 10:27 AM EST	Supplier Type: microFIT	Completed On: Jul 16, 2019 10:30 AM EST
Requested By: John Smith	Legal Entity Type: Joint Venture - No Legal Personality	
Submission Reason: Changing the Legal Name of the Supplier		
Submission Explanation: Updating legal name		

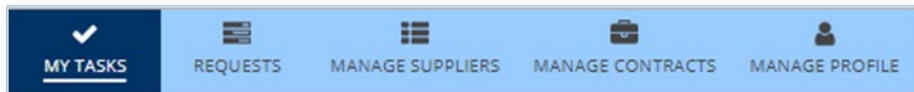
Providing Acknowledgement of a Request Outcome

If the IESO approves or declines your Request, you may receive a **Provide Acknowledgement** task where you must acknowledge the IESO's decision.


If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you under **MY TASKS**.

Procedure

1. Select the **MY TASKS** tab.

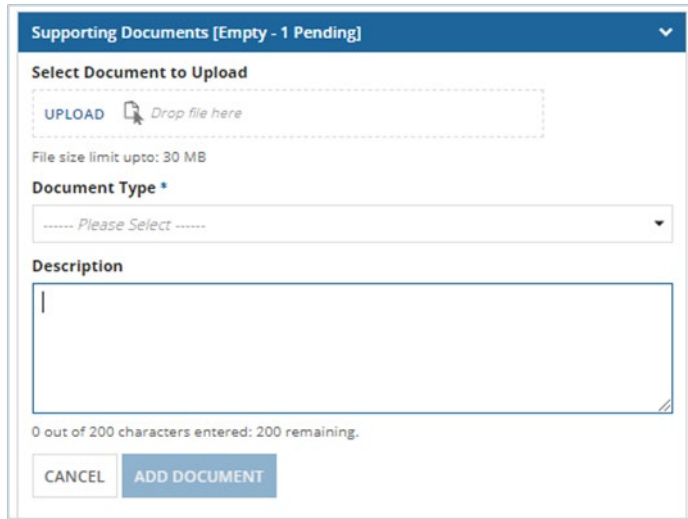


2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	Provide Acknowledgement	

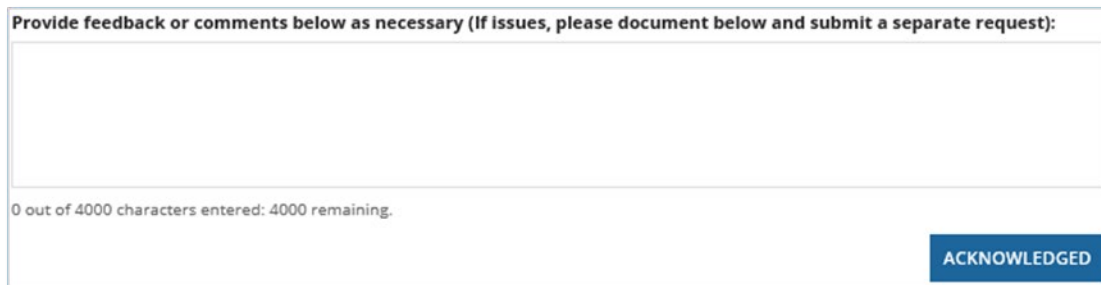
3. Review the information and any documents added by other users.

4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



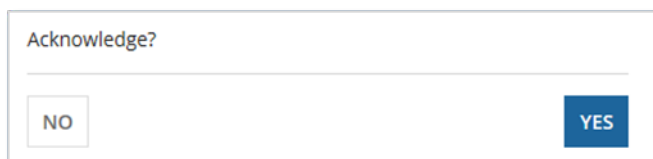
The screenshot shows a dialog box titled "Supporting Documents [Empty - 1 Pending]". It contains a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" area. Below this, it states "File size limit upto: 30 MB". There is a "Document Type" dropdown menu with "Please Select" as the current selection. A "Description" text area is present, with a character count below it: "0 out of 200 characters entered: 200 remaining." At the bottom, there are "CANCEL" and "ADD DOCUMENT" buttons.

5. **Optional:** You can enter an explanatory note or comment to provide additional context to the Request for acknowledgement in the comment field provided.



The screenshot shows a text area for providing feedback or comments. The text above the field reads: "Provide feedback or comments below as necessary (If issues, please document below and submit a separate request):". Below the text area, it says "0 out of 4000 characters entered: 4000 remaining." A blue "ACKNOWLEDGED" button is located at the bottom right of the field.

6. Select **Acknowledged**.
7. A dialog box is opened, select **Yes**.



The screenshot shows a dialog box titled "Acknowledge?". It has a horizontal line for a response. Below the line, there are two buttons: "NO" and "YES".

Viewing Request Notifications

When a decision has been made by the IESO for a Request, you may receive a notification message and/or document that can be found in your Request records.

Procedure

1. Select the **REQUESTS** tab
2. In the **Request Search** section, change Status to **CLOSED**.
3. **Optional:** Use the other filters to search for the Request record you want to view.

Status CLOSED	Supplier ID Enter partial text to search Supplier ID	Final Outcome --- Show All ---
Request ID S3251	Contract ID Enter partial text to search Contract ID	Final Outcome Decision Date From mm/dd/yyyy
Request Category --- Show All ---	Prepared By --- Show All ---	Final Outcome Decision Date Thru mm/dd/yyyy
Request Type --- Show All ---	Source --- Show All ---	
Requested From mm/dd/yyyy	Requested Thru mm/dd/yyyy	

1 Requests Found

		Request ID	Request Type	Requested	Requested By	Prepared By	Supplier ID	Final Outcome Decision Date	Final Outcome Decision By
CLOSED	×	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST	John Smith	John Smith	221524	Jul 25, 2019 10:35 AM EST	IESO

4. Select the **Request ID** to view the Request Record.

1 Requests Found				
		Request ID	Request Type	Requested
CLOSED	×	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST

5. To see notification messages from IESO, select the **Message to Supplier** tab.

The screenshot shows a web interface with four tabs: 'Summary', 'Message To Supplier', 'Attachments', and 'Related Actions'. The 'Message To Supplier' tab is active. Below the tabs, there is a notification header: 'Notification to Supplier [Change to Supplier Resident Status]'. The message content is as follows:

Dear John Smith,

The Change to Supplier Resident Status (Request ID #S3251) submitted for the subject microFIT Contract has been Declined by the IESO.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Turpis massa sed elementum tempus egestas sed sed. Sed sed risus pretium quam vulputate dignissim suspendisse in. Quis imperdiet massa tincidunt nunc pulvinar sapien et ligula ullamcorper.

If you have any questions, don't hesitate to contact the IESO Contract Management Team via your microFIT Supplier Account or email as required.

Regards,

microFIT.contract@ieso.ca

IESO Contract Management Team

6. To download and see notification documents sent from the IESO, select the **Attachments** tab.

The screenshot shows the 'Attachments' tab selected. Below the tabs, there is a blue bar with the text: 'Select any documents below and click on **DOWNLOAD DOCUMENTS** to access them'. Below this is a table with the following columns: 'Document Name', 'IESO Updated Document Name', 'Document Description', 'Document Type', and 'Submitted By'. There are checkboxes in the first column for each row.

<input checked="" type="checkbox"/>	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By
<input checked="" type="checkbox"/>	SUPPLIER NOTIFICATION [123 Hospital [microFIT-221524]]			Supplier Notification Document	IESO

Documents selected - [1]

DOWNLOAD DOCUMENT CLEAR SELECTION

7. Check the box for the notification document, and then select **DOWNLOAD DOCUMENT**.

8. A dialog box is opened, select **Yes**.

The dialog box contains the text: 'A Task will be created to Download document. Refresh the page to view the task link below'. Below the text are two buttons: 'NO' and 'YES'.

9. Refresh your page.

10. Select DOWNLOAD DOCUMENTS.

Download Documents	
Note: Click on any available links below to view document task	
Task Name	Created On
Download Documents	7/25/2019 10:49 AM EST

11. Select a document name to begin downloading it.

Note: These documents will be available for download for 24 hours.

Download Documents

This task will be available for 24 hours . Please make sure to download the documents before that.

Document Name
CM -microFIT - 221524 - Change to Supplier - Supplier Notificati- IESO Deploy - 20190725103623 - SUPPLIER NOTIFICATI-221524

DONE

12. Select **DONE**.

13. A dialog box is opened, select **Yes**.

The task will be cleared and you will have to generate a new request to download these documents. Are you sure you want to close it?

Downloading and Saving Documents

For your records, you can download and save documents related to your Suppliers, your Contracts, your profile account and/or any related Requests submitted.

Procedure

1. Select the tab that contains the Record you want to view.
 - a. To download a Supplier document, select the **Manage Suppliers** tab.
 - b. To download a Contract document, select the **Manage Contracts** tab.
 - c. To download a Person document, select the **Manage Profile** tab.
2. Select the **ID** for the Record that you want to view.

	Supplier ID
	531340

3. Select the **Documents** tab.

Summary	Requests	Contracts	Notes	Documents	Contacts	Related Actions
---------	----------	-----------	-------	------------------	----------	-----------------

4. **Optional:** Use the filters to find a document that you want to download.

Summary	Requests	Contracts	Notes	Documents	Contacts	Related Actions
Request ID	<input type="text" value="Enter partial text to search for Request Id"/>	Document Type	<input type="text" value="----- Please Select -----"/>			
Document Name	<input type="text" value="Enter partial text to search for Document Name"/>	Document Description	<input type="text" value="Enter partial text to search for description"/>			
IESO Document Name	<input type="text" value="Enter partial text to search for IESO Document Name"/>					
<input type="button" value="CLEAR FILTERS"/>						

5. Check the box(es) for the document(s) that you want to download.

Select any documents below and click on **DOWNLOAD DOCUMENTS** to access them

<input checked="" type="checkbox"/>	Request ID	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By	Available On
<input checked="" type="checkbox"/>	S3167	African_Lion	Document 2	Supporting document 2	New Supplier Registration Supporting Document	John Smith	Jul 16, 2019 09:25 AM EST
<input checked="" type="checkbox"/>	S3167	New-attachment	Document 1	Supporting document 1 for new supplier registration	New Supplier Registration Supporting Document	John Smith	Jul 16, 2019 09:25 AM EST

Documents selected - [2]

[DOWNLOAD DOCUMENT](#) [CLEAR SELECTION](#)

6. Select **DOWNLOAD DOCUMENT**.

7. A dialog box is opened, select **Yes**.

A Task will be created to Download document. Refresh the page to view the task link below

8. Refresh your page.

9. Select **Download Documents**.

Download Documents

Note: Click on any available links below to view document task

Task Name	Created On
Download Documents	7/4/2019 2:23 PM EST

10. To begin saving documents, select the document name for the document(s) that you want to download.

Download Documents

This task will be available for 24 hours . Please make sure to download the documents before that.

Document Name
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043717 - Document 2
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043731 - Document 1

DONE

Note: These documents will be available for download for 24 hours.

11. Select **DONE**.
12. A dialog box is opened, select **Yes**.

The task will be cleared and you will have to generate a new request to download these documents. Are you sure you want to close it?

NO **YES**

Additional Resources

Additional resources can be found at the following links:

microFIT Homepage: <http://www.ieso.ca/Get-Involved/microfit/news-overview>

**Independent Electricity
System Operator**

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Toronto, Ontario M5H 1T1

E-mail: microFIT.contract@ieso.ca

ieso.ca



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