# Table of Contents

**Getting Started**
- What is Beacon? ................................................................. 4
- microFIT Program Roles ......................................................... 4
- Sign in to Beacon ................................................................. 5

**Managing Verification Tasks** .................................................. 6
- Completing a Person Verification Task ...................................... 7
- Completing a Supplier Verification Task .................................... 10
- Completing a Contract Verification Task ................................. 13
- Verification Request Tasks ..................................................... 16
  - Reviewing Requests Submitted by a Supplier Approver ........... 16
  - Providing Clarification for Returned Requests ....................... 18
  - Providing Acknowledgement of a Request Outcome .............. 20
- Viewing Request Notifications .............................................. 22
- Downloading and Saving Documents ...................................... 25
- Additional Resources ......................................................... 28
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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Approver</td>
<td>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. Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.</td>
</tr>
<tr>
<td>Supplier Agent</td>
<td>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. A Supplier Agent cannot submit or review requests to the IESO.</td>
</tr>
<tr>
<td>IESO</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

01 Go to http://www.ieso.ca/Get-Involved/microfit/login.
02 Enter your account username and password.
03 Select Sign In.

This brings you to the Available Programs dashboard.

04 Select the FIT-microFIT Supplier program tile.

This brings you to the My Tasks page in Beacon.
Managing Verification Tasks
Completing a Person Verification Task

When accessing Beacon for the first time, you will be asked to verify your personal contact information contained on the Person record. This will be initiated through a Person Verification task that will appear on your My Tasks page. The purpose of this task is to verify that the information that the IESO has on record is correct and, if there has been a change to your personal contact information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Person Verification task in Beacon.

Procedure

01 Select the My Tasks tab.

02 Select Complete Person Verification for the Request that you want to work on.

This brings you to the Enter Changes page.
03 If your contact information has changed then update your contact information, and then select NEXT. 

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

You can upload additional documents or select NEXT. 

Note: If there have been any material changes to your personal contact information (e.g. a name change), you might be required to submit certain documentation as evidence of the change.

05 On the Review page, look over all your changes.

06 Optional: You can enter an explanatory note or comment to provide additional context to a submitted change in the Submission Comment field.

07 Select [Submit Changes].

If you didn’t make any changes, select [Verify No Changes].

08 A dialog box is opened, select Yes.

Once the Request is submitted, a confirmation page is displayed.
Completing a Supplier Verification Task

After your Person Verification task has been submitted and approved by the IESO, you will be asked to verify the information related to your Supplier(s). This will be initiated through a Supplier Verification task that will appear on your My Tasks page. The purpose of this task is to verify that the information that IESO has on record for your Supplier(s) is correct and, if there has been a change to your Supplier(s) information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Supplier Verification task in Beacon.

Procedure

01 Select the My Tasks tab.

02 Select Complete Supplier Verification for the Request that you want to work on.

This brings you to the Enter Changes page.

03 To begin working on the task, select .

04 If your Supplier information has changed then update your Supplier information.
05 Optional: You can enter an explanatory note or comment to provide additional context to a submitted change in the **Submission Comment** field.

06 Select **NEXT >**.

07 Optional: On the **Upload Supporting Documents** page, select **[UPLOAD NEW DOCUMENT]**.

Attach a document, choose a document type, provide a description, and then select **ADD DOCUMENT**.

You can upload additional documents or select **NEXT >**.

**Note:** If there have been any material changes to your Supplier(s) information (e.g. a Supplier name change, legal entity type), you might be required to submit certain documentation as evidence of the change.
08 On the **Review** page, look over all your changes, and then select **Submit Changes**.

If you didn’t make any changes, select **Verify No Changes**.

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

Once the Request is submitted, a confirmation page is displayed.
Completing a Contract Verification Task

After your Supplier Verification task has been submitted and approved by the IESO, you will be asked to verify the information related to your Contract(s). This will be initiated through a Contract Verification task that will appear on your My Tasks page. The purpose of this task is to verify that the information that IESO has on record for your Contract(s) is correct and, if there has been a change to your Contract(s) information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Contract Verification task in Beacon.

Procedure

01 Select the My Tasks tab.

02 Select Complete Contract Verification for the Request that you want to work on.

This brings you to the Enter Changes page.

03 To begin working on the task, select Accept.

04 If your Contract information has changed then update your Contract information.
05 **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the **Submission Comment** field.

06 Select **SUBMIT CHANGES**.

07 **Optional:** On the **Upload Supporting Documents** page, select ![Upload New Document](image). Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.

You can upload additional documents or select **NEXT >**.

**Note:** *If there have been any material changes to your Contract(s) information (e.g. an address update), you might be required to submit certain documentation as evidence of the change.*

08 On the **Review** page, look over all your changes, and then select **SUBMIT CHANGES**.

If you didn’t make any changes, select **VERIFY NO CHANGES**.
09 A dialog box is opened, select Yes.

Once the Request is submitted, a confirmation page is displayed.
Verification Request Tasks

Reviewing Requests Submitted by a Supplier Approver

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

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

01 Select the My Tasks tab.

02 Select the Active Task for the Request that you want to review.

This brings you to the Review page.

03 To begin working on the task, select .

04 Review the values entered and the documents in the Request.
05 **Optional:** To upload supporting documents, select ![UPLOAD NEW DOCUMENT](image). Attach a document, choose a document type, enter a description, and then select ![ADD DOCUMENT](image).

06 Under **Decision**, choose either **Approve**, **Return for Edit**, or **Decline**.

   a. If you select **Approve**, you can enter an explanatory note or comment to provide additional context to the review task, and then select ![APPROVE](image).

   b. 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](image).

   c. 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](image).

07 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

01 Select the My Tasks tab.

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

03 On each page, make changes to the fields that require updates.

04 On the Supporting Documents page, review any documents added by other users.
05 **Optional**: To upload supporting documents, select [UPLOAD NEW DOCUMENT].

Attach a document, choose a document type, enter a description, and then select [ADD DOCUMENT].

You can upload additional documents or select [NEXT >].

**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.

06 Review the changes summarized on the **Review** page.

07 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].

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

01 Select the My Tasks tab.

02 Select the Provide Acknowledgement task.

This brings you to the Pending Acknowledgement page.

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

04 Optional: To upload supporting documents, select +UPLOAD NEW DOCUMENT.
Attach a document, choose a document type, enter a description, and then select.

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

Provide feedback or comments below as necessary (if issues, please document below and submit a separate request):

A dialog box is opened, select 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

01 Select the Requests tab.

02 In the Request Search section, change Status to CLOSED.

03 Optional: Use the other filters to search for the Request record you want to view.

04 Select the Request ID to view the Request Record.
05 To see notification messages from IESO, select the **Message to Supplier** tab.

```
Message to Supplier Tab
```

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

```
Notification to Supplier [Change to Supplier Resident Status]

Dear [Name],

The Change to Supplier Resident Status (Request ID #53251) 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 tempor sagittis sed sed. Sed sed risus pretium quam vulputate dignissim suspendisse in. Quis imperdiet massa tincidunt nunc pulvinar sapien et ligula ultrices.

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
```

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

```
Attachments Tab
```

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

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

<table>
<thead>
<tr>
<th>Document Name</th>
<th>IESO Updated Document Name</th>
<th>Document Description</th>
<th>Document Type</th>
<th>Submitted By</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPPLIER NOTIFICATION [123 Hospital [microFIT-221524]]</td>
<td></td>
<td>Supplier Notification Document</td>
<td>IESO</td>
<td></td>
</tr>
</tbody>
</table>

Documents selected - [1]

DOWNLOAD DOCUMENT  CLEAR SELECTION
```

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

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

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

[NO]
[YES]
```
09 Refresh your page.

10 Select Download Documents.

11 Select a document name to begin downloading it.

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

12 Select DONE.

13 A dialog box is opened, select Yes.
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.
   - To download a Supplier document, select the Manage Suppliers tab.
   - To download a Contract document, select the Manage Contracts tab.
   - To download a Person document, select the Manage Profile tab.

2. Select the ID for the Record that you want to view.

3. Select the Documents tab.

4. Optional: Use the filters to find a document that you want to download.
05 Check the box(es) for the document(s) that you want to download.

06 Select.

07 A dialog box is opened, select Yes.

08 Refresh your page.

09 Select Download Documents.
To begin saving documents, select the document name for the document(s) that you want to download.

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

Select **DONE**.

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?
Additional Resources

Additional resources can be found at the following links:

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