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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.
New Supplier Registration
Registering a New Supplier

During the lifecycle of your microFIT Contract(s), there might be changes to the ownership of the project. In some instances, you might be required to register a new Supplier. To register a new Supplier, you can submit a Supplier Registration Request. Once a Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete Supplier Registration Request in Beacon.

Procedure

01 Select the Manage Supplier tab.

02 Select Register New Supplier.

This brings you to the Register New Supplier page.

03 Choose from the Supplier Type, Legal Entity Type, and Reason for Registration menus.

Note: The Supplier Type you choose determines what fields and validations are required during registration for the Supplier entity and Supplier related entities.

04 Enter the information for the new Supplier.

05 Select NEXT >.
06 Optional: On the 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: When you register a new Supplier, you might be required to submit certain documentation as evidence of certain Supplier information (e.g. legal entity type, resident status, etc.).

07 On the Review page, confirm your information, and then select Submit Request. If you didn’t make any changes, select Verify No Changes.
A dialog box is opened, select Yes.

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.

**Note:** The Request now has a Request ID that you can use to track its progress.
Cancelling the Registration of a New Supplier

You can cancel a Supplier Registration Request that you submitted.

**Note:** You can cancel a Supplier Registration Request only before the IESO has accepted the Request for review.

Procedure

01 Select the **Manage Suppliers** tab.

02 Select the pending Request that you want to cancel.

This brings you to the Request Record for the Supplier registration.

03 Select **Cancel Request**.
04 On the **Confirm Cancellation** page, enter the reason for cancelling the Request.

![Confirm Cancellation of Request S3164](image)

05 Select **CANCEL REQUEST**.

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

![Dialog Box](image)

Are you sure?

- [NO](image)

- [YES](image)

07 Refresh your page.

08 The Request status is now “closed” and the outcome is “Cancelled”.

![Request Status](image)
Supplier Overview
Manage Suppliers Page

After the Supplier Registration process is complete, you’ll see all of your Suppliers on the Manage Suppliers page.

- To register a new Supplier, select Register New Supplier.
- To add or remove Contacts from Supplier(s), select Add/Remove Contacts for Supplier(s).
- You can search for Suppliers by using these filters.
- To see a Supplier Record, select the Supplier ID.
- To see the status of the Supplier, hover over the icon.
- Select any header to sort your Suppliers by those criteria.

You can search for Suppliers by using these filters.
Supplier Record Overview

When you select a Supplier ID, this brings you to the Supplier Record’s Summary page.

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

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

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

The Record Locked table shows information about the Request that is locking the Supplier. For more details, select the Request ID.
Managing Supplier Requests
Submitting a Request to Change a Supplier Record

To update the Record information for a Supplier, you can submit a Change to Supplier Request. You can submit a Supplier Request for the following actions:

- Change to Supplier Address
- Change to Supplier Banking Information
- Change to Supplier HST-GST Status/Number
- Change to Supplier Legal Name
- Change to Supplier Ownership Information, Partners, Parents
- Change to Supplier Resident Status
- Supplier Change of Control
- Other

Once a Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Supplier Request in Beacon.

Procedure

01 Select the Manage Suppliers tab.

02 Optional: Use the filters to search for the Supplier that you want to change.

03 Select the Supplier ID for the Supplier that you want to change.
04 Select **Related Actions > Submit Change Request**.

05 On the **Submit Change Request** page, choose what type of Request you want to submit. *Note: Different entity types will have different change Requests to select from.*

06 Choose a reason for submitting the change, enter a description for your Request, and then select **NEXT**.

07 A dialog box is opened, select **CONTINUE**.

08 On the **Supplier Information** page, make the updates to the Supplier information, and then select **NEXT >**.
09 Optional: On the 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: When you submit a Supplier Change Request, you might be required to submit certain documentation as evidence of certain information (e.g. legal entity type, resident status, etc.).

10 On the Review page, look over all your changes, and then select "SUBMIT REQUEST".

11 A dialog box is opened, select "Yes".

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

Note: The Request now has a Request ID that you can use to track its progress.
Adding or Removing Contacts from Suppliers or Contracts

During the term of your microFIT Contract(s), there might be changes to the Contacts who manage your Supplier(s) and/or Contract(s).

The following instructions will guide you through how to Add and/or Remove Contacts from Supplier(s) in Beacon. For instructions on how to Add and/or Remove Contacts from a Contract, please refer to the Contract Management user guide document.

Adding Supplier Contacts to Suppliers

Procedure

01 Select the Manage Suppliers tab.

02 Select Add/Remove Contacts for Supplier(s).

This brings you to the Add/Remove Contacts for Supplier(s) page.

03 Optional: Use the filters to search for the Supplier(s) that you want to add.
04 Check the box(es) for the Supplier(s) that you want to add.

05 Select Add Contacts >

06 A dialog box is opened, select Yes.

07 On the Add Contacts to Supplier page, choose a reason for submitting the Request, and then enter a description for your Request.
08 Enter the Person ID and email address for the Contact that you want to add, and then select Search.

09 Select Add Person.

10 Choose a Role.

11 You can add more Contacts or select Next >.
12 **Optional:** On the **Add to Contracts (Optional)** page, select the Contracts related to the Supplier that you want to add the Contact(s) to.

![Add to Contracts (Optional) page](image)

13 Select [NEXT >](#).

14 **Optional:** On the **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: When you add additional Contacts to Suppliers or Contracts, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, director’s register, etc.).

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

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

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.

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

Alternatively, you can initiate a Request to add Supplier Contacts to a Supplier by going to a Supplier Record and selecting **Related Actions > Add Contacts**.
Removing Supplier Contacts from Suppliers

01 Select the Manage Suppliers tab.

02 Select Add/Remove Contacts for Supplier(s).

This brings you to the Add/Remove Contacts for Supplier(s) page.

03 Optional: Use the filters to search for the Supplier(s) you want to remove.
04 Check the box(es) for the Supplier(s) that you want to remove.

05 Select Remove Contacts > NEXT >

06 A dialog box is opened, select Yes.

07 On the Remove Contacts to Supplier page, choose a reason for submitting the change, and then enter a description for your Request.
08 Check the box(es) for the Contact(s) that you want to remove from the selected Contract(s), and then select NEXT >.

**Note:** You cannot remove all Contacts with the Supplier Approver role. Contracts that have only one Approver cannot be selected.

On the Remove from Contracts (Mandatory) page, review the Contracts associated with the selected Supplier(s). All the selected Contacts will be removed from these Contracts.

09 Select NEXT >.

10 Optional: On the 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:** When you remove Contacts from Suppliers or Contracts, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, director’s register, etc.).
On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.

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

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

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

Alternatively, you can initiate a Request to remove Supplier Contacts from a Supplier by going to a Supplier Record and selecting **Related Actions > Remove Contacts**.
Supplier 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 Accept.

04 Review the values entered and the documents in the Request.
Optional: To upload supporting documents, select

Attach a document, choose a document type, enter a description, and then select

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

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

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

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 \( +\text{UPLOAD NEW DOCUMENT} \).

Attach a document, choose a document type, enter a description, and then select \( +\text{ADD DOCUMENT} \).

You can upload additional documents or select \( +\text{NEXT } \).

\textbf{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 \( \text{REQUEST UPDATED} \).
   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 \( \text{CANCEL} \).

08 A dialog box is opened, select \textbf{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

**01** Select the Requests tab.

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

**03** Select the Request ID to view the Request Record that you want to cancel.
04 Select **CANCEL REQUEST**.

Supplier Request [S3172]

<table>
<thead>
<tr>
<th>Submitted</th>
<th>IESO Review</th>
<th>Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPEN</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Confirm Cancellation of Request S3172

- **Prepare Change Request - Submit**
  - **Time**: Jul 16, 2019 10:27 AM EST
  - **Performed By**: John Smith
  - **Role**: Supplier Approver
  - **Reason**: 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.

06 Select **CANCEL REQUEST**.

07 A dialog box is opened, select Yes.

Are you sure?

- NO
- YES
08 Refresh your page.

09 The Request status is now “CLOSED” and the outcome is “Cancelled”.

<table>
<thead>
<tr>
<th>Submitted</th>
<th>IESO Review</th>
<th>Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CLOSED</td>
</tr>
</tbody>
</table>

**Close Request - Closed**

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

**Comment**

< No Comment >

**Request - Change to Supplier Legal Name**

- **Request ID**: S3172
- **Request Type**: Change to Supplier Legal Name
- **Requested On**: Jul 16, 2019 10:27 AM EST
- **Requested By**: John Smith
- **Submission Reason**: Changing the Legal Name of the Supplier
- **Submission Explanation**: Updating legal name

**Supplier**

- **Supplier**: ABC Joint Venture
- **Supplier ID**: 531340
- **Supplier Type**: microFIT
- **Legal Entity Type**: Joint Venture - No Legal Personality

**Outcome**: Cancelled

- **Reviewed On**: Jul 16, 2019 10:30 AM EST
- **Completed On**: Jul 16, 2019 10:30 AM EST
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.

06 Select **ACKNOWLEDGED.**

07 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.
To see notification messages from IESO, select the **Message to Supplier** tab.

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

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

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

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

01 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.

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

03 Select the Documents tab.

04 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.

**Download Documents**

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

<table>
<thead>
<tr>
<th>Document Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM-microFIT - 531340 - New Supplier Registration - John Smith - 20190716043717 - Document 2</td>
</tr>
<tr>
<td>CM-microFIT - 531340 - New Supplier Registration - John Smith - 20190716043731 - Document 1</td>
</tr>
</tbody>
</table>

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:
