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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.

<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.
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.

To initiate a Contract Request, select Submit Contract Changes.

Select any header to sort your Contracts by those criteria.

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.
Contract Record Overview

When you select a **Business 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 view and download documents related to the Contract, 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 Contract. For more details, select the **Request ID**.
Managing Contract Requests
Contract Requests

Submitting a Request to Change a Contract Record

To update the Record information in one or more Contracts, you can submit a Change to Contract Request. You can submit a Change to Contract Request for the following actions:

- Change to Facility Information
- Change to Contract Notice Mailing Address
- Other
- Termination

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

Procedure

01 Select the Manage Contracts tab.

02 Select Submit Contract Changes.

03 Choose the type of Request you would like to submit.

*Note: The type of Request you choose determines what fields and filters are required for you to select Contracts to update.*
To filter the Contracts, choose a Contract version and LDC.

Check the box(es) for the Contract(s) that you want to change, and then select . The Contract(s) that you select are displayed under Contracts Selected.

Note: The number of Contracts that you can select depends on the type of Request that you selected. You can choose only unlocked and verified Contracts.

To undo selections from Contracts Selected, check the box(es) for the Contract(s) that you want unselected, and select .

ADD SELECTED [2]

REMOVE SELECTED [1]
06 Choose a reason for the Request, enter a description for your Request, and then select.

07 On the **Enter Changes** page, make the required changes to the Contract, then select.

08 Optional: On the **Upload Supporting Documents** page, select.

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

You can upload additional documents or select.

**Note:** When you submit a Contract Change Request, you might be required to submit certain documentation as evidence of certain information (e.g. legal entity type, resident status, etc.).

09 On the **Review** page, look over all your changes, and then select.
10 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 Contract Request for a Contract by going to a Contract Record, and then selecting **Related Actions** and the action that you want to take.
Submitting a Request to Terminate a Contract

During the lifecycle of your microFIT Contract(s), you may wish to terminate the contract for certain reasons. To initiate a contract termination, you can submit a Termination Request.

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

Procedure

01 Select the Manage Contracts tab.

02 Optional: Use the filters to search for the Contract that you want to terminate.

03 Select the Business Contract ID to view the Contract that you want to terminate.
04 Select Related Actions > Termination.

- **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.

05 On the Confirm page, choose a submission reason, and then enter a description for your Request.

### Submit Termination

- **Contract ID:** FIT-ABCDE
- **Supplier Type:** microFIT
- **Requested By:** John Smith
- **Submission Reason:**

  Please Select

- **Describe Reason for Request**

  0 out of 2000 characters entered. 0 remaining.

06 Read through the Terms & Conditions of Termination.
07 Download the termination form by selecting **Download and Sign**.

**Note:** You must print out this form to fill in and sign. Scan the completed form to submit it to the IESO when you upload supporting documents in step 10.

Choose a **Proposed Date of Termination**, and select **Next >**.

08 Check the box for **I understand and accept the terms of the Notice of Termination**.

09 Choose a **Proposed Date of Termination**, and select **Next >**.

10 On the **Upload Supporting Documents** page, select **Add 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 Contract Termination Request, you might be required to submit certain documentation as evidence of certain information (e.g., prescribed forms, Notice of Termination, etc.).
11  On the Review page, look over all your changes, and then select **Submit Request**.

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

Adding Supplier Contacts to a Contract

Procedure

01 Select the Manage Contracts tab.

02 Optional: Use the filters to search for the Contract that you want to add Contacts to.

03 Select the Business Contract ID to view the Contract that you want to add Contacts to.

Note: You can add Contacts to a Contract only if they have already been added as a Contact to the Supplier. For instructions on how to Add and/or Remove Contacts from a Supplier, please refer to the Supplier Management user guide document.
04 Select **Related Actions > Add Contacts**.

05 On the **Add Contacts to Contract** page, choose a reason for submitting the change, and then enter a description for your Request.
06 Enter the Person ID and email address for the Contact that you want to add to the Contract, and then select **SEARCH**.

07 Select **+Add Person**.

<table>
<thead>
<tr>
<th>Person Id</th>
<th>Person Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>229149</td>
<td>John Smith</td>
<td><a href="mailto:john_smith@simplemail.in">john_smith@simplemail.in</a></td>
</tr>
</tbody>
</table>

**Contact Details**

Click on +ADD button to add into the queue below

<table>
<thead>
<tr>
<th>Person Id</th>
<th>Person Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>229149</td>
<td>John Smith</td>
<td><a href="mailto:john_smith@simplemail.in">john_smith@simplemail.in</a></td>
</tr>
</tbody>
</table>

**Selected Contacts - [1]**

<table>
<thead>
<tr>
<th>Person Id</th>
<th>Person Name</th>
<th>Email Address</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>229149</td>
<td>John Smith</td>
<td><a href="mailto:john_smith@simplemail.in">john_smith@simplemail.in</a></td>
<td><strong>Select Role</strong></td>
</tr>
</tbody>
</table>

Choose a **Role**.

**Select Role**

- Supplier Agent
- Supplier Approver

09 You can add more Contacts or 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 add additional Contacts to Contracts, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, director’s register, etc.).

11 On the Review page, look over all your changes, and then select ![SUBMIT REQUEST](#).

12 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.
Removing Supplier Contacts from a Contract

Procedure

01 Select the Manage Contracts tab.

02 Optional: Use the filters to search for the Contract that you want to remove Contacts from.

03 Select the Business Contract ID to view the Contract that you want to remove Contacts from.

04 Select Related Actions > Remove Contacts.
05 On the **Remove Contacts to Contract** page, choose a reason for submitting the change, and then enter a description for your Request.

06 Check the box(es) for the Contact(s) that you want to remove from the selected contract(s), then select **NEXT >**

**Note:** You cannot remove all Contacts with the Supplier Approver role. Contracts that have only one Approver cannot be selected.
07 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 additional Contacts to Contracts, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, director’s register, etc.).

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

09 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.
Contract 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

01 Select the My Tasks tab.

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

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].

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

![Drag file here](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].

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].

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].

![Decision form](image)

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

Depending on your decision, the Request may be under IESCO 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**.
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.
04  Select CANCEL REQUEST.

Supplier Request [S3172]

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
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

Select CANCEL REQUEST.

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

06  Select CANCEL REQUEST.

07  A dialog box is opened, select 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><strong>CLOSED</strong></td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**Close Request - Closed**

- **Time**: Jul 16, 2019 10:30 AM EST
- **Performed By**: SYSTEM - AUTO
- **Role**: IESO
- **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**: 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.
05 To see notification messages from IESO, select the **Message to Supplier** tab.

![Image of Message to Supplier tab with notification message]

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

Dear John Smith,

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 egestas sed sed. Sed sed risus pretium quam vulputate dignissim suspendisse in. Quis imperdiet massa tristique 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

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

![Image of Attachments tab with notification document]

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>Supplier Notification Document</td>
<td></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**.

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.

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?
Additional Resources

Additional resources can be found at the following links:
