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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>
</table>
| Supplier Approver  | 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.** |
| Supplier Agent     | 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.** |
| 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

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**.

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 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 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.

01 Select the **Manage Contracts** tab.

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

03 Select the **Business Contract ID** for the Contract that you want to initiate the Contract Assignment Request for.
04 Select Related Actions > Contract Assignment.

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

06 Choose a proposed effective date, and then select NEXT.
07 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**

**John Smith [mirc0FIT-257523] [CONFIRMED]**

<table>
<thead>
<tr>
<th>Supplier Legal Name:</th>
<th>John Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier ID:</td>
<td>757573</td>
</tr>
<tr>
<td>Supplier Type:</td>
<td>microFIT</td>
</tr>
<tr>
<td>Legal Entity Type:</td>
<td>Individual</td>
</tr>
<tr>
<td>Non-Resident of Canada?</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

**Verify Person Information**

**John Smith [CONFIRMED]**

<table>
<thead>
<tr>
<th>Person Name:</th>
<th>John Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Id:</td>
<td>959117</td>
</tr>
<tr>
<td>Account Id:</td>
<td><a href="mailto:john.smith@yopmail.com">john.smith@yopmail.com</a></td>
</tr>
</tbody>
</table>

---

08 Select **NEXT >**
09 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.

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.

12 Select NEXT >.
13 On the **Verify Requirements** page, confirm that the Assignor requirements have been met, and then select [NEXT >](#).

14 **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:** 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.

17 Select .

18 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.

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.

**01** Select the **My Tasks** tab.

**02** Select **Confirm Contract Assignment** for the Request that you want to review.

This brings you to the **Request Information** page.

**03** Review the information, and then select **NEXT >**.
04 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.

05 Select **NEXT >**.
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.

07 Select **NEXT >**.
08 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.

09 Select **NEXT >**.

10 **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: 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 for declining the Contract Assignment Request, and then select DECLINE.

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.

01 Select the **My Tasks** tab.

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

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

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

You must accept this task before completing it  **ACCEPT**  **GO BACK**  **REASSIGN**
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.

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

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

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

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

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**.

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.
**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.

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.
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**
- **Supplier ID**: 531340
- **Supplier Type**: microFT
- **Legal Entity Type**: Joint Venture - No Legal Personality

**Outcome**
- **Reviewed On**: Jul 16, 2019 10:30 AM EST
- **Completed On**: Jul 16, 2019 10:30 AM EST
- **Outcome**: Cancelled
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 **ADD DOCUMENT**.

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**.

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

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.
10 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:
