BEACON
microFIT Supplier
DIGITAL USER GUIDE
Person Management
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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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.
The **Record Locked** table shows information about the Request that is locking the Contract. For more details, select the **Request ID**.

### Contract: FIT-MABCDEF

<table>
<thead>
<tr>
<th>Request ID</th>
<th>Request Type</th>
<th>Date Requested</th>
<th>Requested By</th>
</tr>
</thead>
<tbody>
<tr>
<td>C4817</td>
<td>Change to Contract Notice Mailing Address</td>
<td>Jul 17, 2019 11:11 AM EST</td>
<td>John Smith</td>
</tr>
</tbody>
</table>

**Contract FIT-MABCDEF**

- **Contract Status**: Executed
- **Contract Id**: FIT-MABCDEF
- **Contract Version**: 3.3
- **Contract Capacity (kW)**: 9.9
- **Nameplate Capacity (kW)**: 9.9
- **Contract Price**: 29.4
- **Supplier Legal Name**: John Smith
- **Supplier Id**: 757373
- **LDC**: Bluewater Power Distribution Corporation

**Contract Notice Mailing Address**

88 Gask st.
Kabul 65465
Afghanistan

**Facility Address**

200 Bloor Dr.
Cologne, Ontario N1N 1N1
Canada
Person Overview
Manage Profile Page

On the Manage Profile page you’ll see your basic account profile information.

To see a Person Record, select the Person ID.
Person Record Overview

An individual user’s detailed profile information is contained on the Person Record. The Person Record is linked to an account, which the individual user can access to manage all applicable Suppliers and Contracts.

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

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

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

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

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

To update your profile, select **Update Profile**.

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

To change your password and/or your security question(s), select **Update Password and/or Challenge Questions**.
Managing Person Requests
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) project.

The following instructions will guide you through how to Add and/or Remove Contacts from Supplier(s) or Contract(s) in Beacon.

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.

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 **Optional:** 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**.

![Supporting Documents page](image)
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.

Note: Supplier(s) can be selected of same Supplier Type only. Locked suppliers excluded.

<table>
<thead>
<tr>
<th></th>
<th>Supplier Id</th>
<th>Supplier Legal Name</th>
<th>Supplier Type</th>
<th>Legal Entity Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>221524</td>
<td>123 Hospital</td>
<td>microFIT</td>
<td>Hospital</td>
</tr>
<tr>
<td></td>
<td>531340</td>
<td>ABC Joint Venture</td>
<td>microFIT</td>
<td>Joint Venture - No Legal Personality</td>
</tr>
</tbody>
</table>

CLEAR SELECTION

Supplier(s) Selected [ 2 ]

Contact Request Type? *

- Add Contacts
- Remove Contacts

CANCEL  NEXT >

05 Select Remove Contacts > NEXT >

06 A dialog box is opened, select Yes.

This will lock all suppliers selected and their contracts. Continue?

NO  YES

07 On the Remove Contacts to Supplier page, choose a reason for submitting the change, and then enter a description for your Request.

Submit Remove Contact Person from Supplier/Contract

<table>
<thead>
<tr>
<th>Request Type: Remove Contact Person from Supplier/Contract</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier: Multiple Supplier(s) selected</td>
</tr>
<tr>
<td>Requested On: Jul 30, 2019 10:15 AM EST</td>
</tr>
<tr>
<td>Requested By: John Smith</td>
</tr>
<tr>
<td>Reason for Change*</td>
</tr>
<tr>
<td>Describe Reason for Change*</td>
</tr>
</tbody>
</table>

0 out of 4000 characters entered; 4000 remaining.
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.

09 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.

10 Select **NEXT >**.

11 Optional: On the **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 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**.

Are you sure you want to remove the selected contacts from supplier(s) and their respective contracts?

- **NO**
- **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**.
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.

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**.
08 Choose a Role.

```
<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></td>
</tr>
</tbody>
</table>
```

09 You can add more Contacts or select NEXT >.


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.
Person 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.
**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]

- **Summary**
- **Attachments**
- **Related Actions**

<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

- 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

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

| 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: | microFT |
| 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.
Optional: To upload supporting documents, select **UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.

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

Select **ACKNOWLEDGED**. 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.

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

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

08 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**.
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:
