Beacon FIT Supplier

Digital User Guide
Contract Assignments

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Getting Started

What is Beacon?

Beacon is a new tool that the IESO introduced in 2019 that enables you to manage all of your active FIT Contracts online. Beacon consolidates all FIT Contract information into one place and integrates the Contract management functions of the FIT 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 FIT Contracts.

FIT Program Roles

Beacon allows for the following FIT Program Roles for the purpose of managing the FIT contract as described below.

Beacon Program Roles

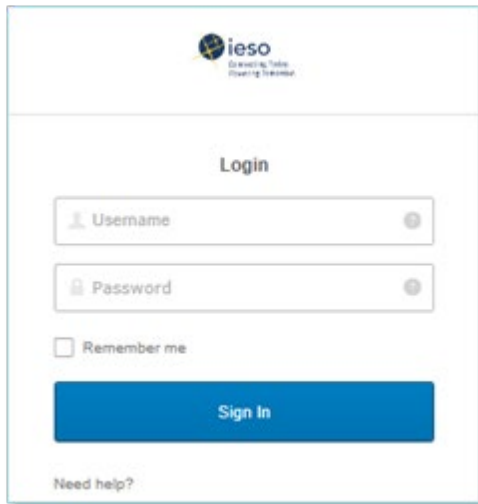| Role	Description
Supplier Approver	The Supplier Approver is the FIT Contract counterparty or an individual who has the authority to act on behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to "you" and "your" throughout this user guide are references to a Supplier Approver. **Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the FIT Contract.**
Supplier Agent	The Supplier Agent is an *optional* role assigned by the Supplier Approver in relation to a FIT Contract. When assigned to a FIT Contract, a Supplier Agent can view the FIT Contract and related information and prepare certain types of requests for review and approval by a Supplier Approver. **A Supplier Agent's actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.**

Role	Description
IESO CM FIT Analyst	The IESO CM FIT Senior Analyst is responsible for regular review and processing of requests submitted by the Supplier Approver to the IESO. The IESO CM FIT Senior Analyst can also initiate certain requests that are to be reviewed by the Supplier Approver.
IESO CM FIT Approver	The IESO CM FIT Approver is responsible for final review and approval of certain requests after the completion of the initial review by the IESO CM FIT Senior Analyst.

Sign in to Beacon

To begin managing your FIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.
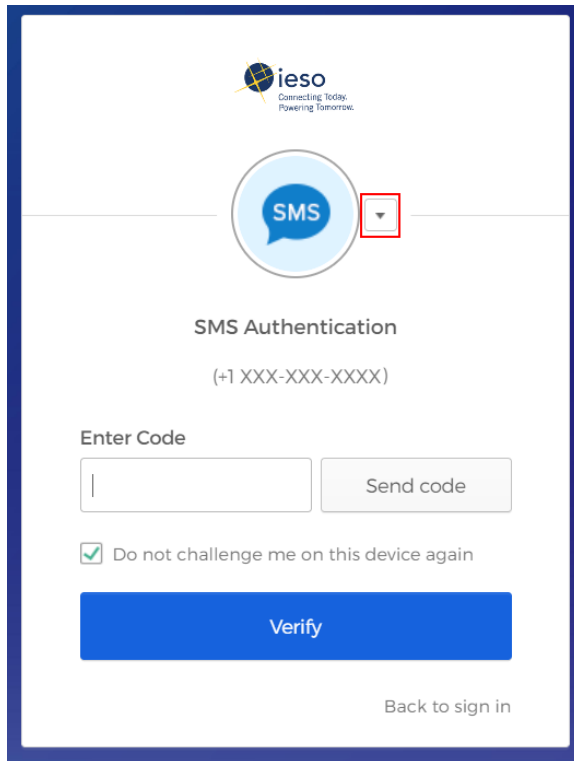
Procedure

1. Go to **https://www.ieso.ca/en/Sector-Participants/Feed-in-Tariff-Program/Login**.

2. Enter your account username (your email address) and password.

3. Select **Sign In**.

4. If you have set up multiple factors, you can choose which factor you will verify to login. Switch between factors by selecting the drop-down menu arrow next to the authentication icon. Please be aware that you are only required to verify one factor to login.
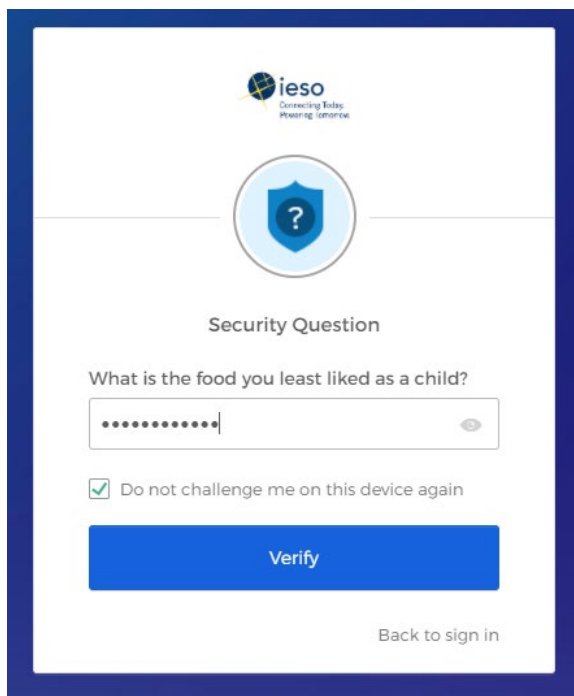
5. Once you have selected your factor, you will be prompted to provide the answer to your Security Question or your SMS/Voice Call Code. Type in the answer or code and click "Verify". **Please be aware that the answer is case sensitive.**
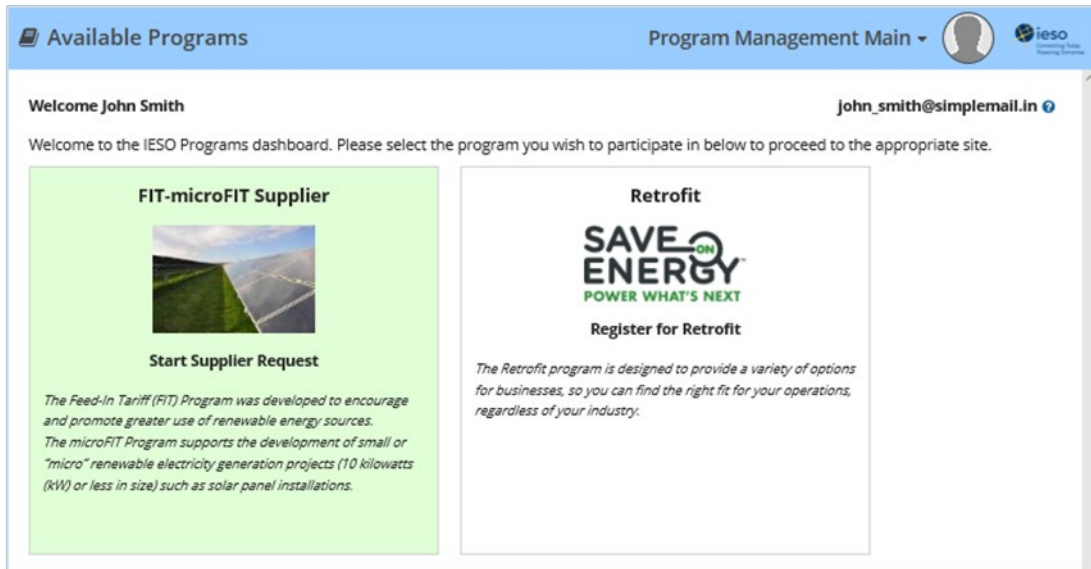
6. On your My Apps Dashboard, select the tile that says "Online IESO"
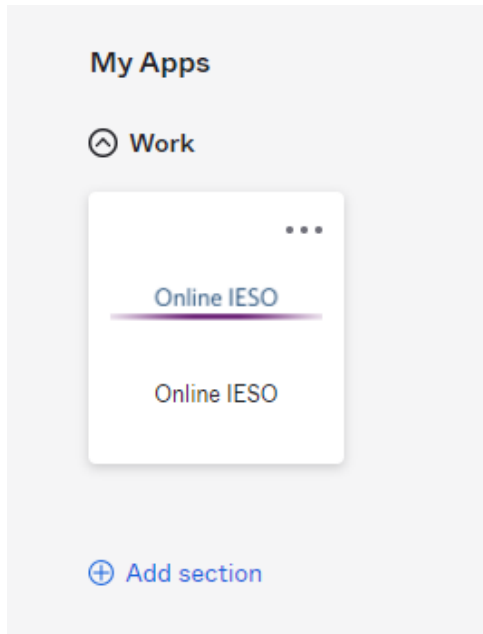
7. Next you will be brought to the Available Programs Dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.

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

To download your contract, select the **Download Contract** 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 FIT 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 FIT 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.

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.

For instructions on how to register a new Supplier, please refer to the **Supplier Management** user guide document. All Beacon user guides are available on the IESO website at:

http://www.ieso.ca/Sector-Participants/Feed-in-Tariff-Program/Beacon-User-Guide-Library

Initiating a Post-COD 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.

1. Select the **MANAGE CONTRACTS** tab.
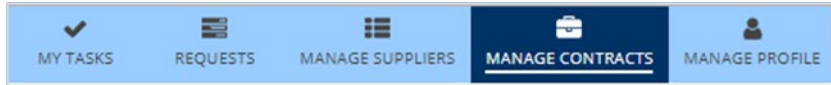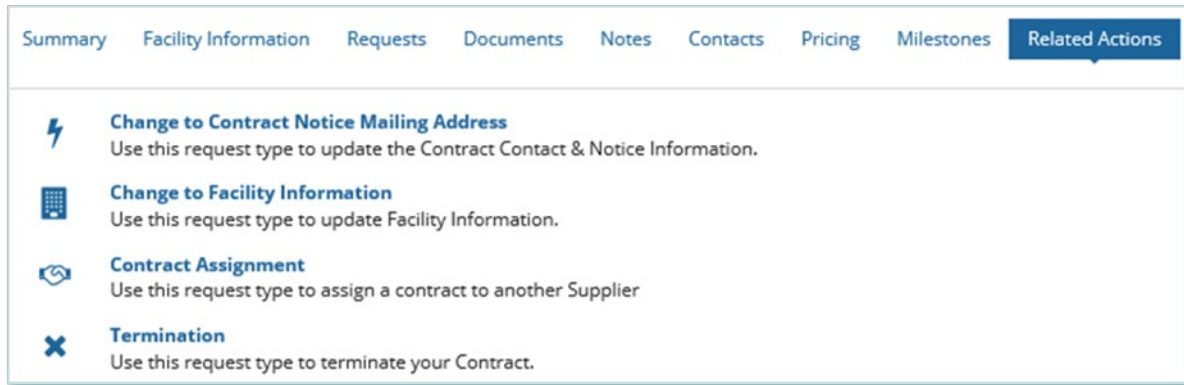
2. **Optional:** Use the filters to find a Contract that you want to initiate the Contract Assignment Request for.

Contract Id	Supplier Type
Enter partial text to search Contract Id	------ Show All ------
Contract Version	**Supplier Id**
	Enter partial text to search Supplier Id
LDC	**Supplier Legal Name**
------ Show All ------	Enter partial text to search Supplier Legal Name
Locked By	**Contract Status**
Request Id or DRAFT	------ Show All ------
Lock Status	
------ Show All ------	

Paging: 10|25|50|Show All

3. Select the **Business Contract ID** to view the Contract that you want to initiate the Contract Assignment Request for.

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name
F-111111-SPV-222-333	FIT	COD	002668	Orange Town Community Farm Ltd.
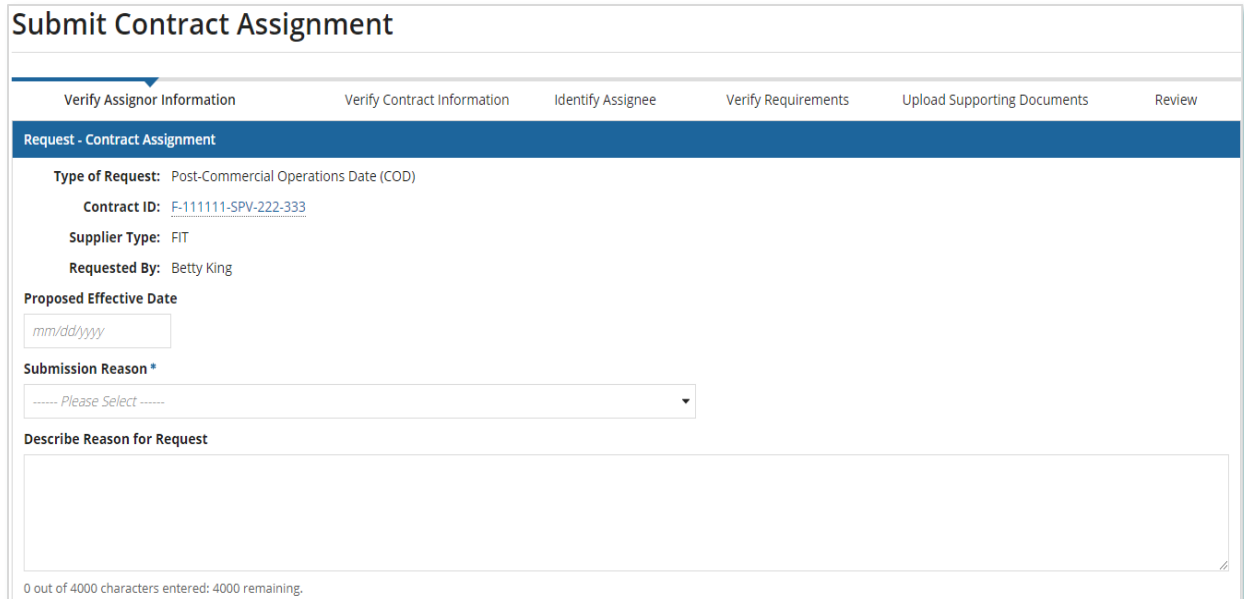
4. Select **Related Actions > Contract Assignment**.

5. Choose a proposed effective date, a reason for the Request, and then enter the reason for submitting the change.

6. Verify both the Supplier and Person information and then select **NEXT**.

Verify Supplier Information

I, **Betty King**, certify that the information below is correct *
○ Y ○ N

Orange Town Community Farm Ltd. [FIT-002668]

Supplier Legal Name: Orange Town Community Farm Ltd.	**GST/HST Registrant?** ○ Yes ● No
Supplier Id: 002668	📇 **Supplier Address**
Supplier Type: FIT	
Legal Entity Type: Corporation	200 Wellington Street West
Non-Resident of Canada? ○ Yes ● No	Suite 1102
	Toronto, Ontario M5V3C7
	Canada

Verify Person Information

I, **Betty King**, certify that the information below is correct *
○ Y ○ N

Betty King

Person Name: Betty King	📇 **Address**
Person Id: 762468	
Account Id: betty.king@sharklasers.com	77 James st.
	Cordoba 65465
	Argentina
	Main Phone
	📞 4169671111
	Primary Email
	betty.king@sharklasers.com

CANCEL REQUEST   NEXT >

7. 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.

Submit Contract Assignment

Verify Assignor Information	Verify Contract Information	Identify Assignee	Verify Requirements	Upload Supporting Documents	Review

Contract F-111111-SPV-222-333

Contract Status: COD	📇 **Contract Notice Mailing Address**
Contract Version: 1.3.0	
Contract Capacity (kW): 150	200 Corn Street West
Nameplate Capacity (kW): 150	Suite 132
	Timmins, Ontario T1T 1T1
Supplier Legal Name: Orange Town Community Farm Ltd. [FIT-002668]	Canada
LDC: Great Canadian Hydro Ltd.	📇 **Facility Address**
	149 Corn Street
	Brampton, Ontario B1B 1B1
	Canada

Verify Contract Information

I, **Betty King**, certify that the information below is correct *
○ Y ○ N

Contract Notice Address

📇 **Address**

200 Corn Street West
Suite 132
Timmins, Ontario T1T 1T1
Canada

CANCEL REQUEST   < BACK   NEXT >

8. Select **NEXT**.

9. 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 would have this information available only if they have completed the Supplier Registration process.

Submit Contract Assignment

Verify Assignor Information	Verify Contract Information	Identify Assignee	Verify Requirements	Upload Supporting Documents	Review

Identify Assignee

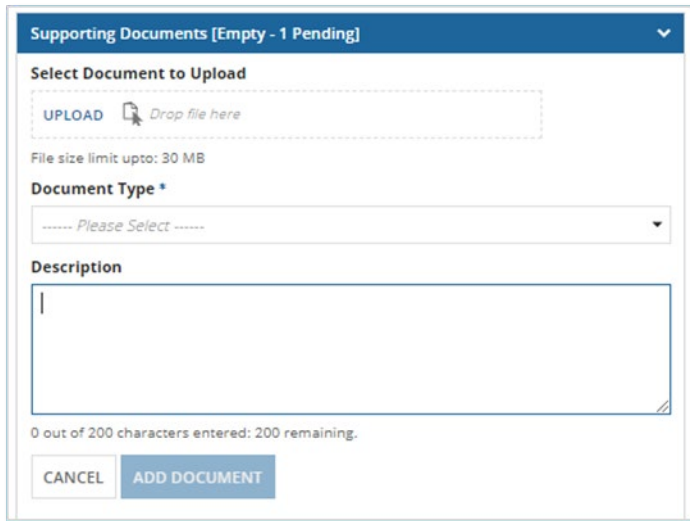| Supplier Id	Supplier Legal Name

CANCEL REQUEST   < BACK   NEXT >

10. Select **NEXT**.

11. On the **Verify Requirements** page, confirm that the Assignor requirements have been met, and then select **NEXT**.

Verify Assignor Information	Verify Contract Information	Identify Assignee	Verify Requirements	Upload Supporting Documents	Review

Assignor Requirements

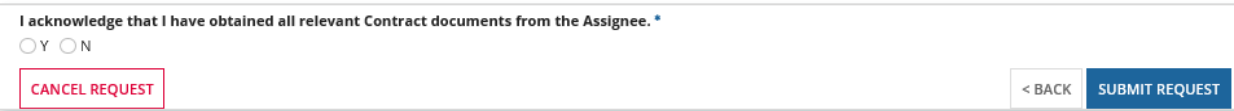|	Requirement Met?	
Other Supporting Documentation	● Yes ○ No	OPTIONAL
Prescribed Form: Post-COD Assignment	● Yes ○ No	REQUIRED

CANCEL REQUEST   < BACK   NEXT >

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

Note: When you submit a Contract Assignment Request, you might be required to submit supporting 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.

13. On the **Review** page, look over all your changes.

14. Ensure to check off all acknowledgments before completing the request.

15. Select **SUBMIT REQUEST**.

16. 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
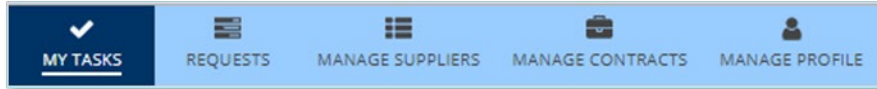
Completing a Post-COD Contract Assignment Request (Assignee)

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.

Procedure

1. Select the **MY TASKS** tab.

2. Select **Confirm Contract Assignment** for the Request that you want to review. This brings you to the **Request Information** page.

Request ID	Request Type	Status	Source	Active Task	Status
C4267	Contract Assignment	[DRAFT]	Supplier	Confirm Contract Assignment	☑

Active Request Tasks In-Progress

3. Review the information, and then select **NEXT**.

4. 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.

Confirm Contract Assignment Information

Request Information | Verify Assignee Information | Enter Assignee Contract Information | Verify Requirements | Upload Supporting Documents | Review

Verify Supplier Information

I, James Holden, certify that the information below is correct *
○ Y ○ N

Rocinante Solar [FIT-396141]

Supplier Legal Name:	Rocinante Solar	GST/HST Registrant? ○ Yes ● No
Supplier Id:	396141	📇 **Supplier Address**
Supplier Type:	FIT	88 Space Ave.
Legal Entity Type:	Renewable Energy Cooperative	Kamloops, British Columbia B1B 1B1
Non-Resident of Canada?	○ Yes ● No	Canada

Verify Person Information

I, James Holden, certify that the information below is correct *
○ Y ○ N

James Holden

Person Name:	James Holden
Person Id:	189365
Account Id:	james.holden@sharklasers.com

📇 **Address**

88 Mars Ave.
Helena, Montana 88888
United States of America

Main Phone
📞 (416) 967-1111

Primary Email
james.holden@sharklasers.com

DECLINE ASSIGNMENT   < BACK   NEXT >

5. Select **NEXT**.

6. On the **Enter Assignee Contract Information** page, enter your Contract notice mailing address.

Request Information | Verify Assignee Information | Enter Assignee Contract Information | Verify Requirements | Upload Supporting Documents | Review

Enter Assignee Contract Information

Contract Notice Mailing Address

Street Address *

12 Blue Street

Additional Mailing Information (optional)

Apartment, suite, unit, rural route, c/o

Country *

Canada ▼

City *

Green

Province *

Ontario ▼

Postal Code *

A1B 2C3

< BACK   NEXT >

7. Select **NEXT**.

8. 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.

9. Select **NEXT**.

Note: To download and complete the Participation Declaration document, refer to the Prescribed Forms available at https://www.ieso.ca/en/sector-participants/feed-in-tariff-program/contract-management.

10. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.
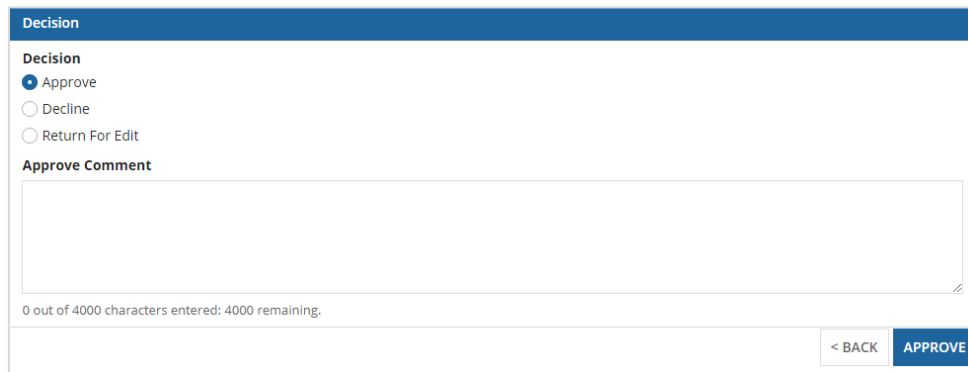
Note: When you submit a Contract Assignment Request, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, parcel register, land transfer documents, etc.).

11. On the **Review** page, choose either **Approve**, **Decline** or **Return for Edit**.

    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 to the Contract Assignment Request, and then select **DECLINE**.

    c. If you Return for Edit, the task will be sent back to the Assignor with your explanatory note or comment on the reason for returning the Request.


Decision

Decision
- ● Approve
- ○ Decline
- ○ Return For Edit

Approve Comment

```



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0 out of 4000 characters entered: 4000 remaining.

< BACK   **APPROVE**

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.

Executing a Post-COD Contract Assignment Agreement (Assignor)

Procedure

1. Select the **MY TASKS** tab.
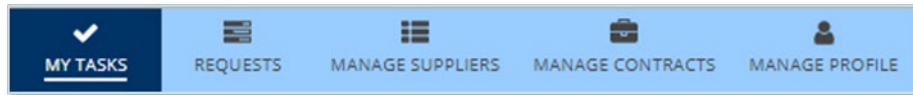
2. Select **Execute Agreement [Assignor]** for the Request that you want to review.

Active Request Tasks In-Progress						
Request ID	Request Type	Status	Active Task	Status	Assigned To	Requested By
C520	Contract Assignment	IESO Review	Execute Agreement [Assignor]	☑	Betty King; Jebediah Smith	Betty King

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

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

You must accept this task before completing it   ⬇ ACCEPT   ⊙ GO BACK   ↱ REASSIGN
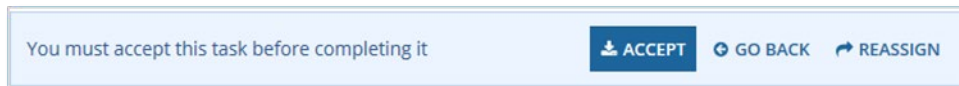
4. Under **Upload Signed Agreement**, choose either **Execute Agreement – Assignor or Decline Agreement**.

Decision

⚠ Please print the Contract Agreement, obtain the required Supplier authorized signatures on the Contract Agreement, scan the signed Agreement, and upload. (Note: If signed hardcopies are required, then mail those to the IESO @ ....address.)

Decision
- ● Execute Agreement - Assignor
- ○ Decline Agreement

    a. If you select **Execute Agreement – Assignor**, follow these steps:
        i. Download the unsigned Contract Agreement by selecting **Unsigned Final Post-COD Assumption & Acknowledgement Agreement**.

      ii. Print the Contract Agreement, obtain the required Supplier authorized signatures, and then scan the signed Agreement.

     iii. To upload the signed Contract Agreement, select **UPLOAD**. Attach a document, you can enter a comment to provide additional context to a submitted document, and then select **UPLOAD SIGNED AGREEMENT**.

Upload Signed Agreement *

UPLOAD   📄 *Drop file here*
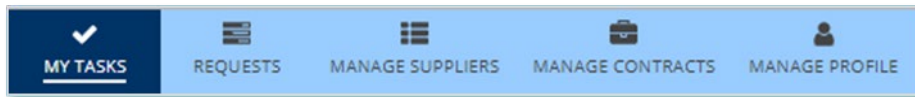
File size limit upto: 30 MB

     iv. **Optional:** Enter an explanatory note or comment to provide additional context to your execution task.

     v. Enter a comment (if needed), check the confirmation box, and then select **EXECUTE AGREEMENT – ASSIGNOR**.

  b. If you select **Decline Agreement**, then select **DECLINE AGREEMENT**.

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

The Request is now under IESO review. Please wait for further instructions from the IESO.

Executing a Post-COD Contract Assignment Agreement (Assignee)

**Procedure**

1. Select the **MY TASKS** tab.

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

Request ID	Request Type	Status	Active Task	Status	Assigned To	Requested By
C520	Contract Assignment	IESO Review	Execute Agreement [Assignee]	☑	James Holden	Betty King

Active Request Tasks In-Progress

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

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

You must accept this task before completing it   ⬇ ACCEPT   ⟲ GO BACK   ↱ REASSIGN
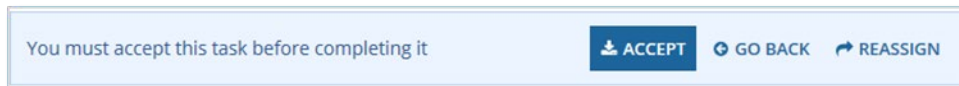
4. Under Upload Signed Agreement, choose either **Execute Agreement – Assignee** or **Decline Agreement**.
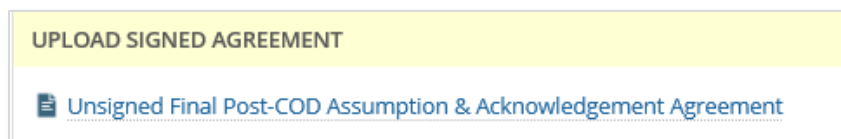
Decision

⚠ Please print the Contract Agreement, obtain the required Supplier authorized signatures on the Contract Agreement, scan the signed Agreement, and upload. (Note: If signed hardcopies are required, then mail those to the IESO @ ....address.)

Decision
- ⦿ Execute Agreement - Assignee
- ◯ Decline Agreement

a. If you select **Execute Agreement – Assignee**, follow these steps:

i. Download the unsigned Contract Agreement by selecting Unsigned Final Post-COD Assumption & Acknowledgement Agreement.

UPLOAD SIGNED AGREEMENT

📄 Unsigned Final Post-COD Assumption & Acknowledgement Agreement

ii. Print the Contract Agreement, obtain the required Supplier authorized signatures, and then scan the signed Agreement.

iii. To upload the signed Contract Agreement, select **UPLOAD**. Attach a document, you can enter a comment to provide additional context to a submitted document, and then select **UPLOAD SIGNED AGREEMENT**.

iv. **Optional:** Enter an explanatory note or comment to provide additional context to your execution task.

v. Enter a comment (if needed), check the confirmation box, and then select **EXECUTE AGREEMENT – ASSIGNEE**.

b. If you select Decline Agreement, then select **DECLINE AGREEMENT**.

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

The Request is now under IESO review. Please wait for further instructions from the IESO.

Propose Assignment Effective Date (Assignor)

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. The Assignor will be required to submit a proposed Assignment Effective Date. This date should be agreed upon by both parties. This date will be reviewed by the Assignee and ultimately by the IESO.
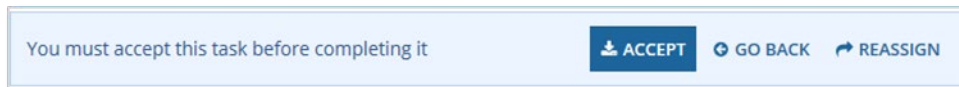
Procedure

1. Select the **MY TASKS** tab.
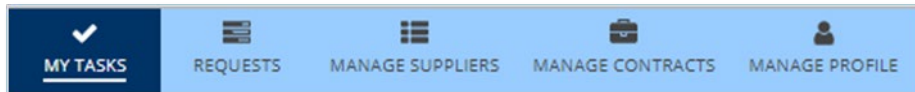
2. Select **Propose Assignment Effective Date [Assignor]** for the Request that you want to work on. This brings you to the **Propose Assignment Effective Date** page.
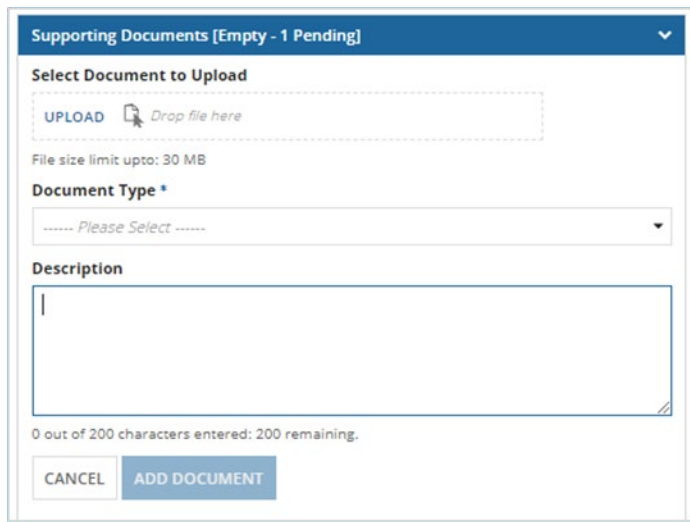
Request ID	Request Type	Status	Source	Active Task	Status	Assigned To	Assigned On	Deadline	Requested By
C520	Contract Assignment	IESO Review	Supplier	Propose Assignment Effective Date [Assignor]	☑	Betty King; Jebediah Smith;	Jan 13, 2020 04:15 PM EST	Mar 13, 2020 05:00 PM EST	Betty King

3. If there are multiple Contacts assigned to the task, to begin working on the task, select **ACCEPT**.

You must accept this task before completing it   ⬇ ACCEPT   ⟳ GO BACK   ↱ REASSIGN

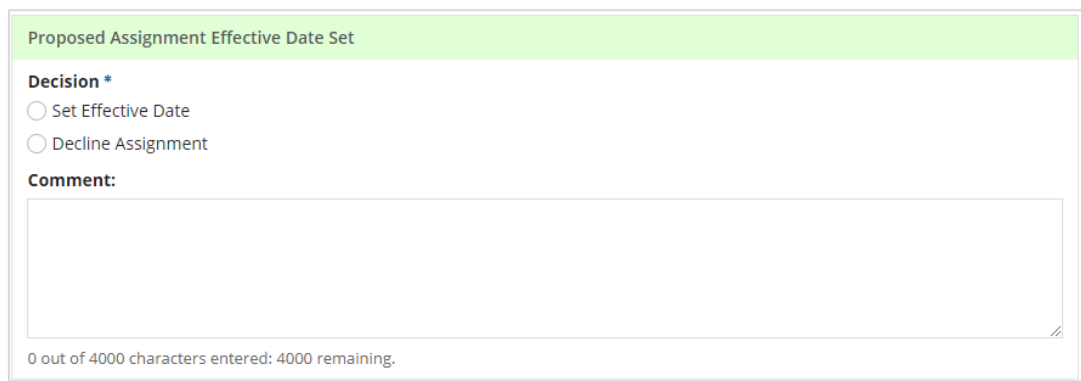4. Review the Assignment information and select **NEXT**.

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

Once the document is uploaded (or if no document is required) select **NEXT** to continue to the **Set Assignment Effective Date & Submit** page.

6. Under Decision, choose either **Set Effective Date** or **Decline Assignment**.

   a. If you select Set Effective Date, you will have the ability to select a proposed effective date, provide additional context, and then select **SET EFFECTIVE DATE**.
   b. If you select Decline Assignment, you can enter an explanatory note or comment to provide additional context for why you declined the Request, and then select **DECLINE**.
7. A dialog box is opened, select **Yes**.

The Request has been sent to the Assignee to Confirm the Assignment Effective Date. Please wait for further instructions from the IESO.

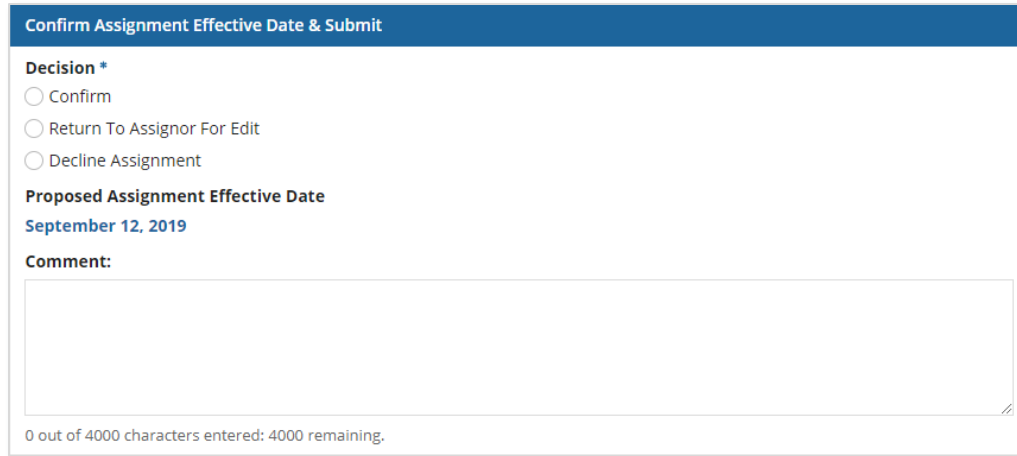## Confirm Assignment Effective Date (Assignee)

Procedure

1. Select the **MY TASKS** tab.
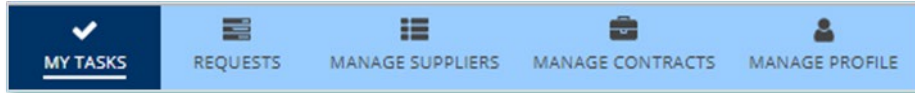
2. Select **Confirm Assignment Effective Date [Assignee]** for the Request that you want to work on. This brings you to the **Review Approved Assignment Request** page.

Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task	Status	Assigned To	Assigned On	Deadline	Requested By
C520	Contract Assignment	IESO Review	Supplier	Confirm Assignment Effective Date	☑	James Holden	Jan 13, 2020 04:23 PM EST	Mar 13, 2020 05:00 PM EST	Betty King

3. If there are multiple Contacts assigned to the task, to begin working on the task, select **ACCEPT**.

You must accept this task before completing it   ⬇ ACCEPT   ⟳ GO BACK   ➦ REASSIGN
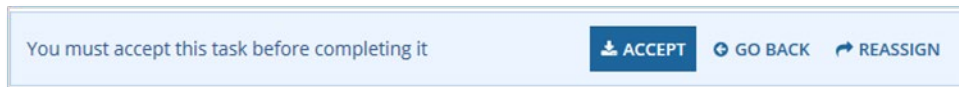
4. Review the Assignment information and select **NEXT**.

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

Supporting Documents [Empty - 1 Pending]   ⌄

Select Document to Upload

UPLOAD ⬚ Drop file here

File size limit upto: 30 MB

Document Type *

------ Please Select ------   ▾

Description

0 out of 200 characters entered: 200 remaining.

CANCEL   ADD DOCUMENT

Once the document is uploaded (or if no document is required) select **NEXT** to continue to the **Set Assignment Effective Date & Submit** page.

6. Under Decision, choose either **Confirm, Return to Assignor for Edit** or **Decline Assignment**.

Confirm Assignment Effective Date & Submit

Decision *
○ Confirm
○ Return To Assignor For Edit
○ Decline Assignment

Proposed Assignment Effective Date
September 12, 2019

Comment:

0 out of 4000 characters entered: 4000 remaining.

    a. If you select Confirm, you agree with the proposed effective date of the Contract Assignment. You may provide additional context within the comment box, and then select **Confirm**.

    b. If you select Return to Assignor for Edit, you will return the task to the Assingor. You may provide additional context for why you are returning the Request, and then select select **Return to Assignor for Edit** to continue.

    c. If you select Decline Assignment, you can enter an explanatory note or comment to provide additional context for why you declined the Request, and then select **DECLINE**.

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

If **Confirm** was selected, the request has been sent to the IESO for final review. If **Return to Assignor for Edit** was selected, the request has been sent to the Assignor for review. If **Decline Assignment** was selected, the request has been sent to the IESO for review. Please wait for further instructions from the IESO.

# 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

1. Select the **MY TASKS** tab.
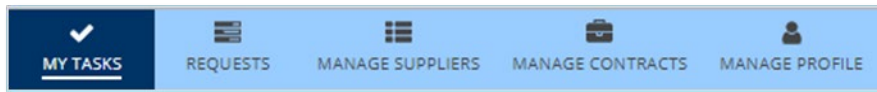
2. Select the **Active Task** for the Request that you want to review. This brings you to the **Review** page.
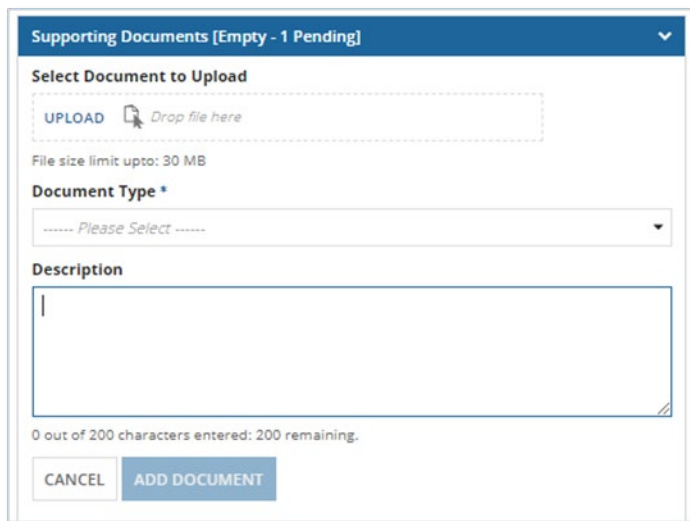
Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	☑

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

You must accept this task before completing it　　　ACCEPT　　GO BACK　　REASSIGN
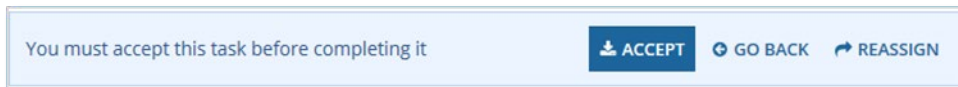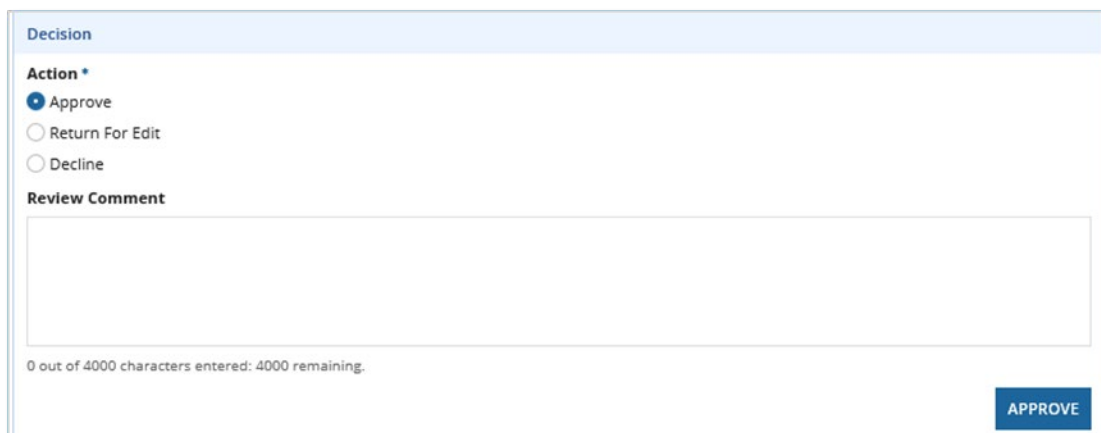
4. Review the values entered and the documents in the Request.

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

6. 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 **Retun 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**.

7. 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

1. Select the **MY TASKS** tab.
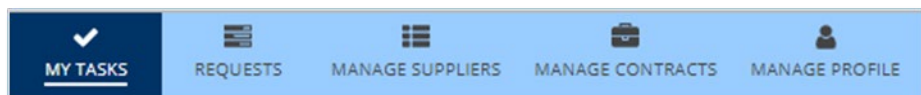
2. Select the **Active Task** for the Request you want to work on.

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

4. On the **Supporting Documents page**, review any documents added by other users

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

> **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.
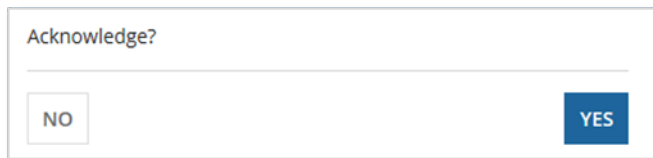
6. Review the changes summarized on the **Review** page.

7. 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**.

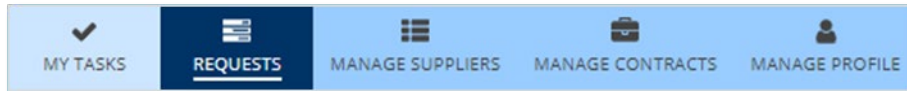8. A dialog box is opened, select **Yes**.

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.
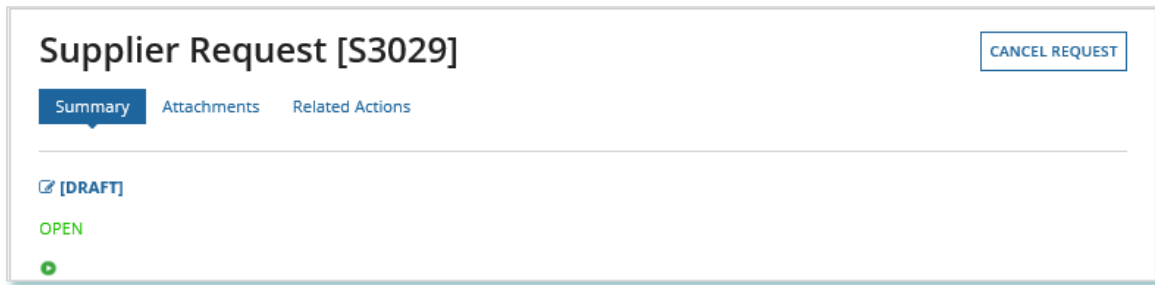
Procedure

1. Select the **Requests** tab.

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

3. Select the **Request ID** to view the Request Record that you want to cancel.

4. Select **CANCEL REQUEST**.

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

6. Select **CANCEL REQUEST**.

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

8. Refresh your page.

9. The Request status is now "CLOSED" and the outcome is "Cancelled".

Submitted	IESO Review	Closed

CLOSED
●

● *Cancel Request - Cancel*

Time	**Performed By**	**Role**	**Reason**
Jul 30, 2019 01:56 PM EST	John Smith	Supplier Approver	

Comment

No longer required

Request - Change to Supplier Ownership Information, Partners, Parents ⌄

Request ID: S3029	**Supplier:** ABC Corporation	**Outcome:** Cancelled
Request Type: Change to Supplier Ownership Information, Partners, Parents	**Supplier ID:** 934358	**Reviewed By:** John Smith
	Supplier Type: FIT	**Reviewed On:** Jul 30, 2019 01:56 PM EST
Requested On: Jul 30, 2019 01:56 PM EST	**Legal Entity Type:** Corporation	**Completed On:** Jul 30, 2019 01:56 PM EST
Requested By: John Smith		
Submission Reason: Update to Supplier Ownership Information, and/or Partners, and/or Parents		

**Submission Explanation:**

testing

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

1. Select the **MY TASKS** tab.
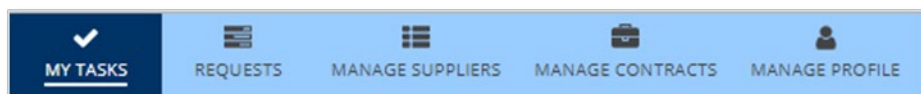
2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.

Active Request Tasks In-Progress

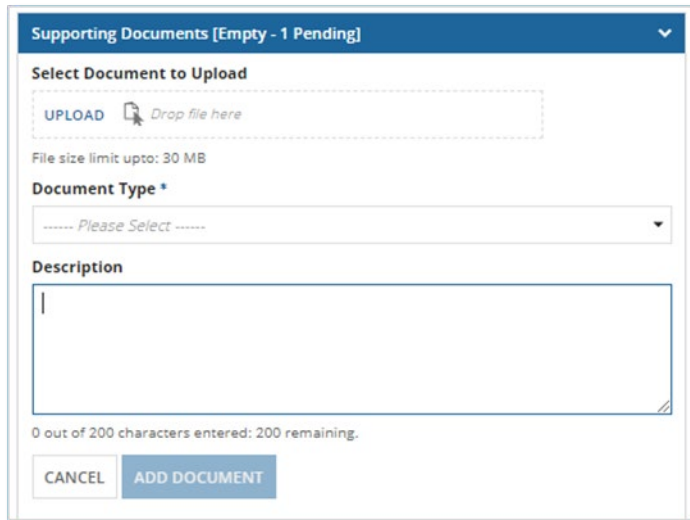| Request ID	Request Type	Status	Source	Active Task
C4664	Contract Assignment	Pending Acknowledgement	Supplier	Provide Acknowledgement

Personalized messages from the IESO will appear here.

Request C4664 Approved - Please Acknowledge

Submitted   IESO Review   Pending Acknowledgement   Closed

Message to Assignee [Contract Assignment]

✉ *Dear John Smith*

The Contract Assignment (Request ID #C4664) submitted for the subject FIT Contract has been Approved by the IESO.

Consequat ac felis donec et odio pellentesque diam. Quis hendrerit dolor magna eget. Ac turpis egestas maecenas pharetra convallis posuere morbi leo. Et leo duis ut diam quam nulla porttitor.

If you have any questions, don't hesitate to contact the IESO Contract Management Team via your FIT Supplier Account or email as required.

Regards,

Frank Approver
devon.beare@ieso.ca

IESO Contract Management Team

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

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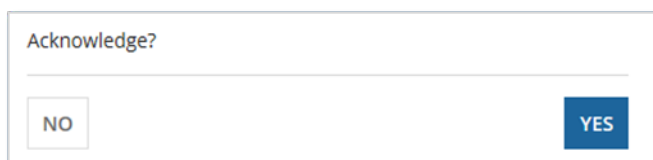

5. **Optional:** You can enter an explanatory note or comment to provide additional context to the Request for acknowledgement in the comment field provided.

6. Select **ACKNOWLEDGED**.

7. 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

1. Select the **REQUESTS** tab.

2. In the **Request Search** section, change Status to **CLOSED**.

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

Status			Supplier ID		Final Outcome	
CLOSED ▼			Enter partial text to search Supplier ID		—— Show All —— ▼	
Request ID			**Contract ID**		**Final Outcome Decision Date From**	
S3251			Enter partial text to search Contract ID		mm/dd/yyyy	
Request Category			**Prepared By**		**Final Outcome Decision Date Thru**	
—— Show All —— ▼			—— Show All —— ▼		mm/dd/yyyy	
Request Type			**Source**			
—— Show All —— ▼			—— Show All —— ▼			

Requested From	**Requested Thru**
mm/dd/yyyy	mm/dd/yyyy

1 Requests Found

		Request ID	Request Type	Requested ↓	Requested By	Prepared By	Supplier ID	Final Outcome Decision Date	Final Outcome Decision By
CLOSED	✕	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST	John Smith	John Smith	221524	Jul 25, 2019 10:35 AM EST	IESO

4. Select the **Request ID** to view the Request Record.

1 Requests Found

		Request ID	Request Type	Requested ↓
CLOSED	✕	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST

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

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

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

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

9. Refresh your page.

10. Select **DOWNLOAD DOCUMENTS**.

Download Documents

⊞ **Note: Click on any available links below to view document task**

Task Name	Created On
Download Documents	7/25/2019 10:49 AM EST

11. Select a document name to begin downloading it.

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.

Document Name
Document #1

DONE

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?

NO	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.

   a. To download a Supplier document, select the **Manage Suppliers** tab.

   b. To download a Contract document, select the **Manage Contracts** tab.

   c. 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.

5. Check the box(es) for the document(s) that you want to download.

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

☑	Request ID	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By	Available On
☑	S3167	African_Lion	Document 2	Supporting document 2	New Supplier Registration Supporting Document	John Smith	Jul 16, 2019 09:25 AM EST
☑	S3167	New-attachment	Document 1	Supporting document 1 for new supplier registration	New Supplier Registration Supporting Document	John Smith	Jul 16, 2019 09:25 AM EST

Documents selected - [2]

[DOWNLOAD DOCUMENT] [CLEAR SELECTION]

6. Select **DOWNLOAD DOCUMENT**.

7. 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]

8. Refresh your page.

9. Select **Download Documents**.

Download Documents

🔲 **Note: Click on any available links below to view document task**

Task Name	Created On
Download Documents	7/4/2019 2:23 PM EST

10. To begin saving documents, select the document name for the document(s) that you want to download.

Download Documents

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

Document Name
Document #1
Document #2

DONE

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?

NO   YES

Additional Resources

Additional resources can be found at the following links:

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

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Powering Tomorrow.