Beacon FIT Supplier

Digital User Guide
Contract Assignments

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Getting Started

Disclaimer

This document shall be used for guidance purposes only and does not amend the FIT Contract or FIT Rules under any circumstances. In the event of a discrepancy between this guidance document and the FIT Contract or FIT Rules, the FIT Contract or FIT 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 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.**

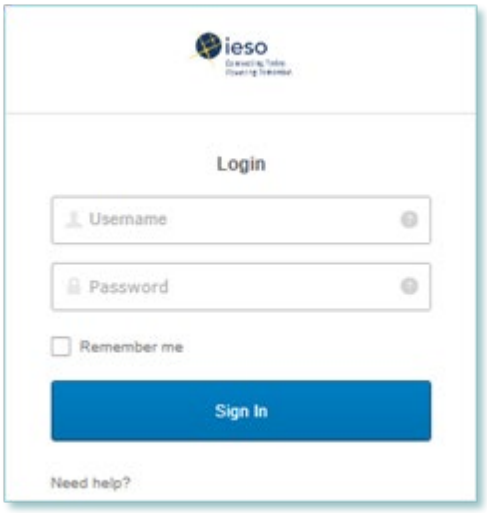
Role	Description
IESO CM FIT Analyst	The IESO CM FIT Senior Analyst is responsible for regular review and processing of requests submitted by the Supplier Approver to the IESO. The IESO CM FIT Senior Analyst can also initiate certain requests that are to be reviewed by the Supplier Approver.
IESO CM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

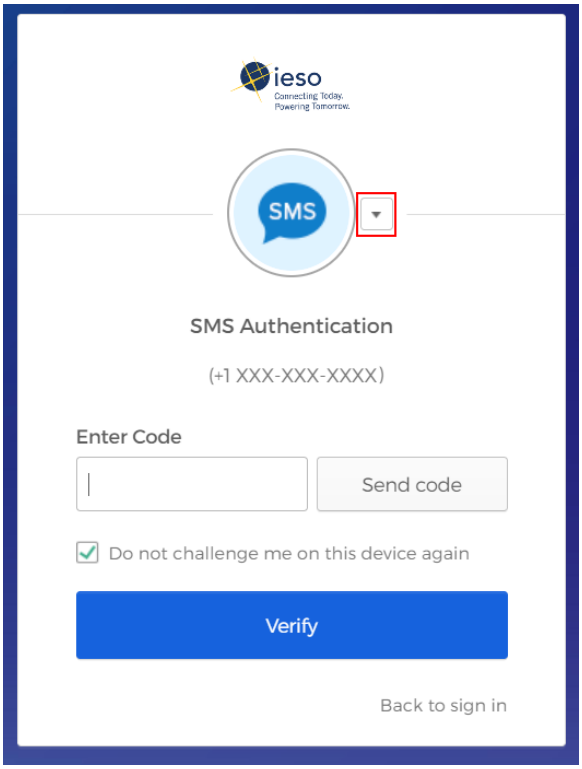
Procedure

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.

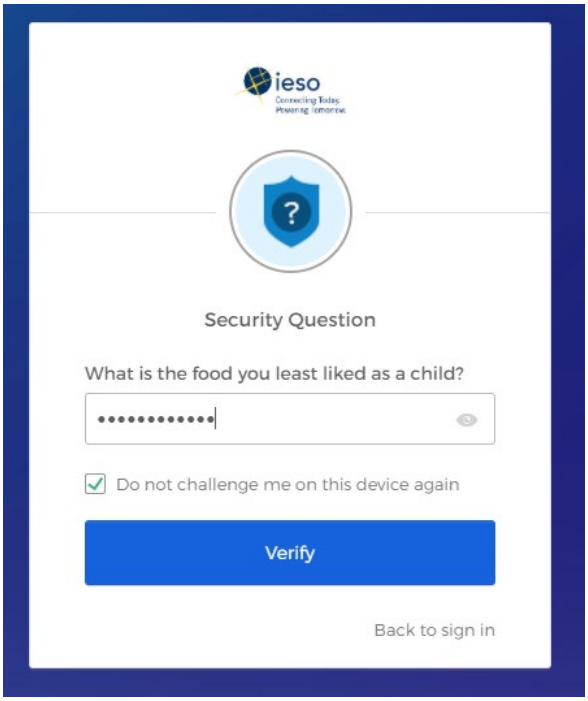


3. Select **Sign In**.

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.**



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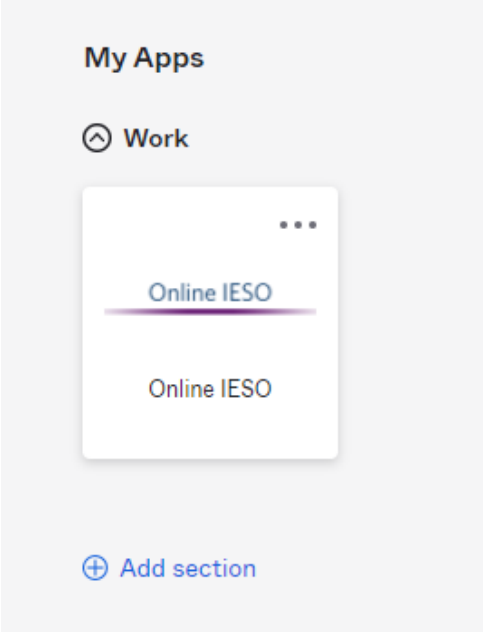
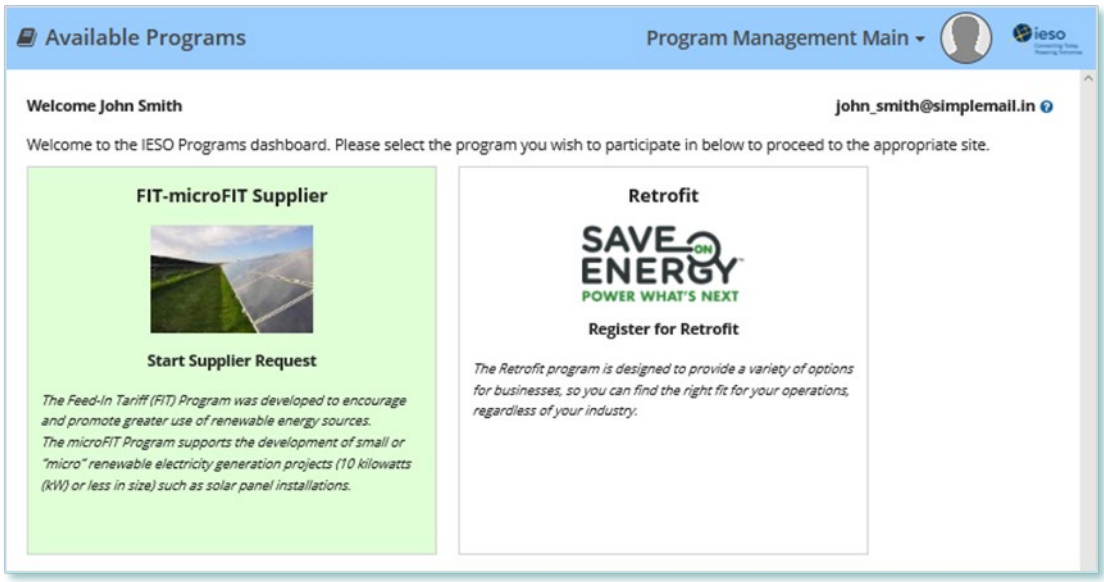
6. On your My Apps Dashboard, select the tile that says "Online IESO"



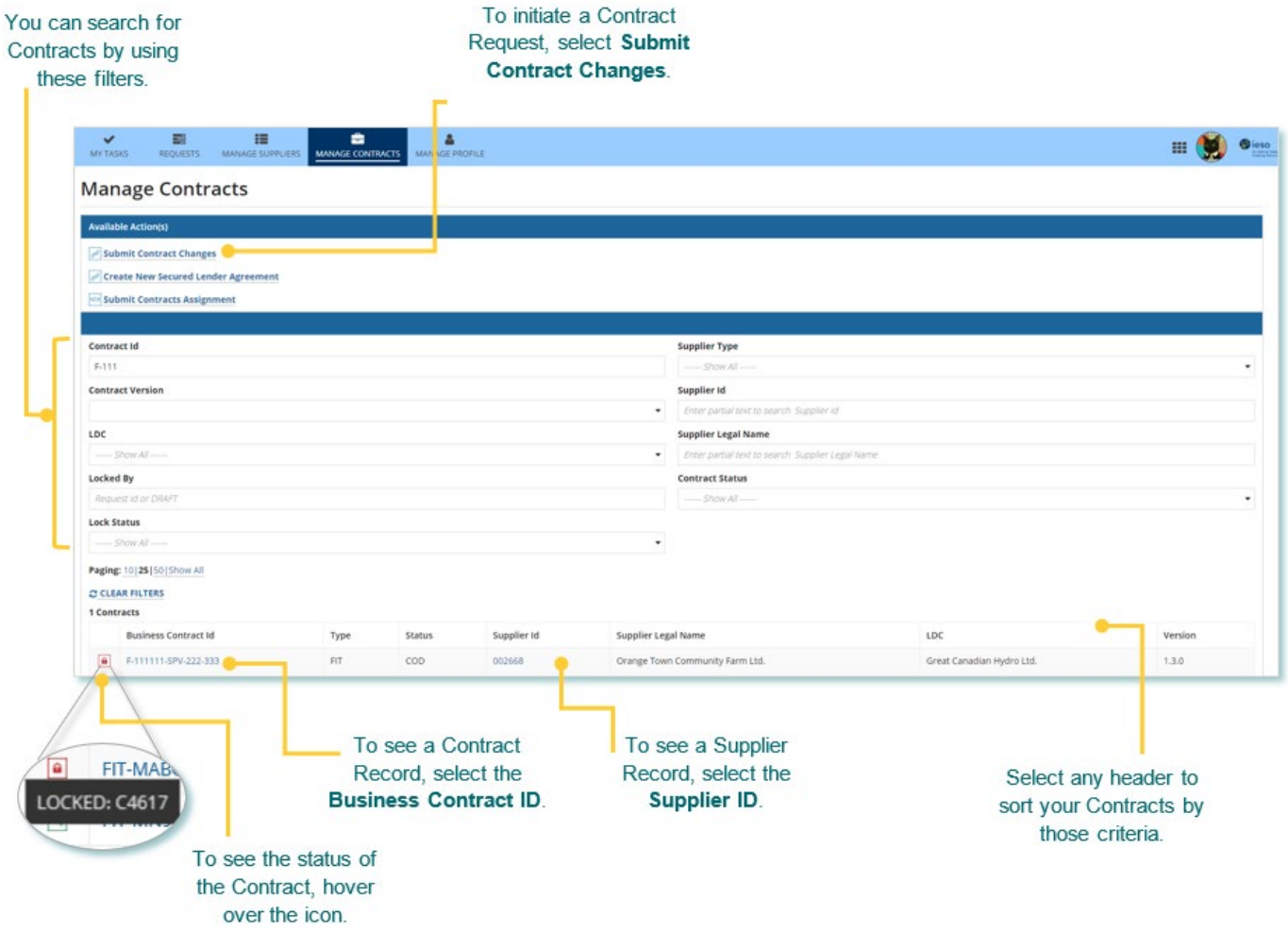
7. Next you will be brought to the Available Programs Dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.



Contract Overview

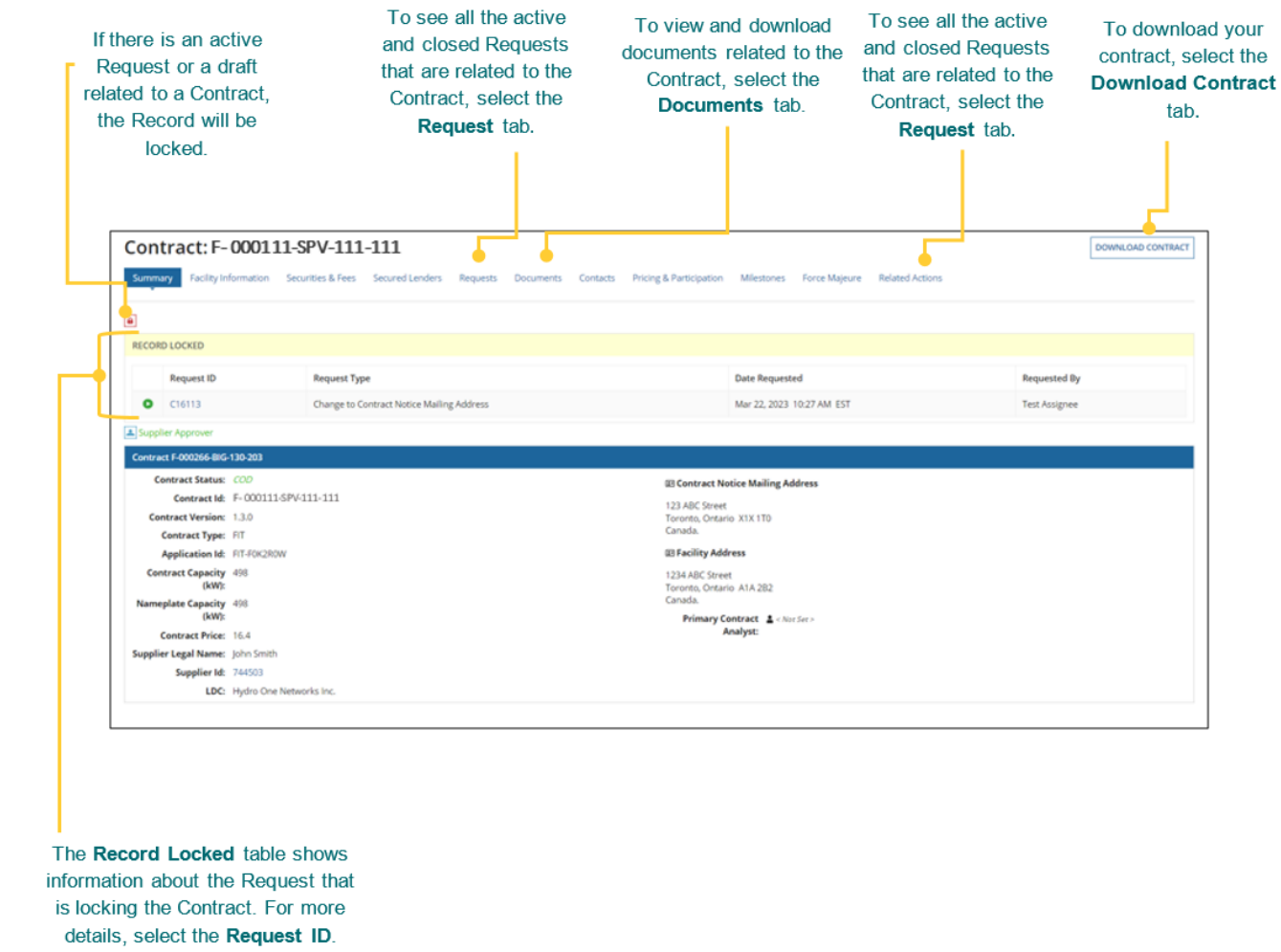
Manage Contracts Page

On the **MANAGE CONTRACTS** page you'll see all of your Contracts.



Contract Record Overview

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



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

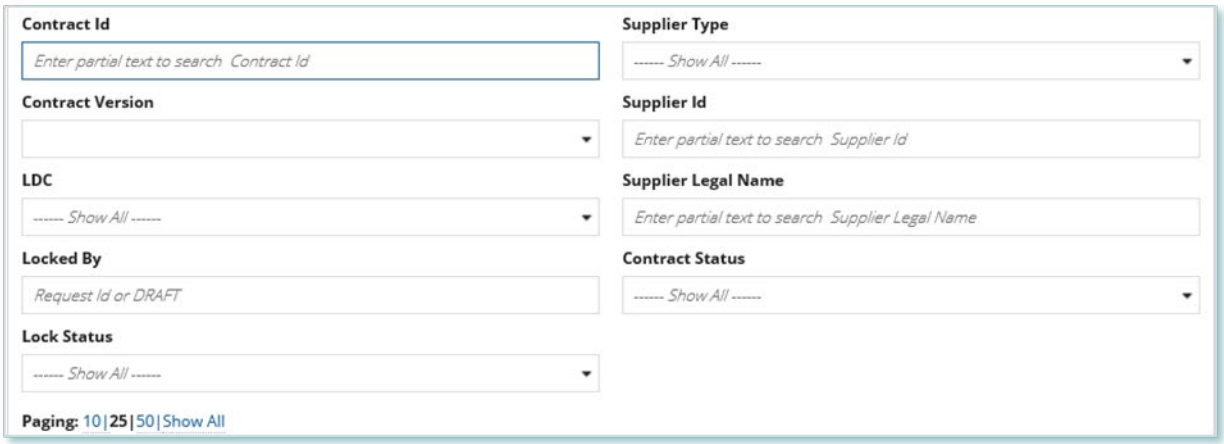
Initiating a Post-COD Contract Assignment Request (Assignor)

Procedure

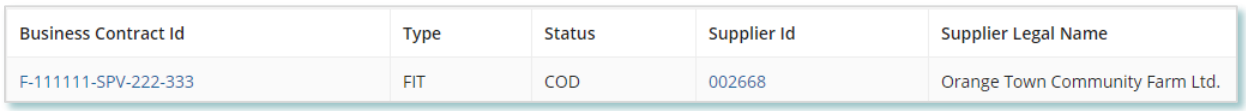
Note: Be sure to download any applicable Contract documents you would like to retain for your records, as these will no longer be available to you as the Assignor once the Contract Assignment Request is complete. Please refer to the Downloading and Saving Documents section at the end of this document 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.

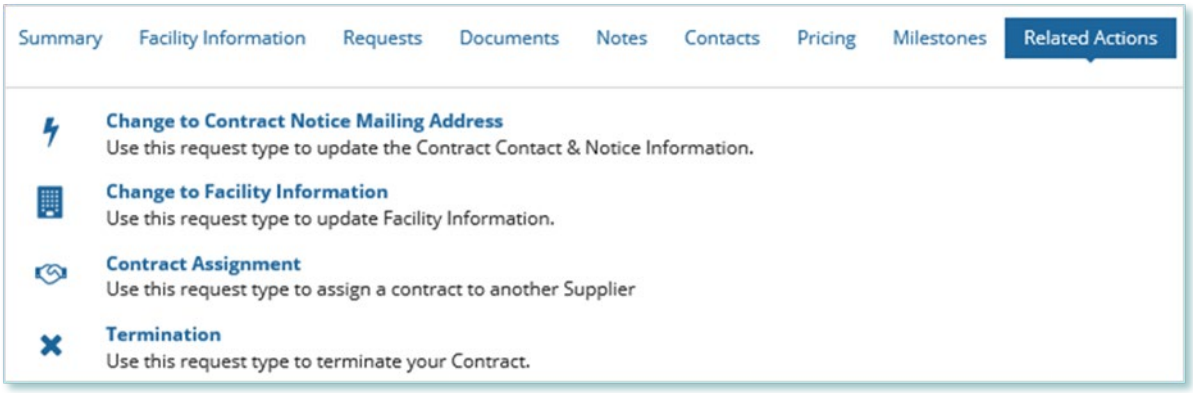


3. Select the **Business Contract ID** to view the Contract that you want to initiate the Contract Assignment Request for.

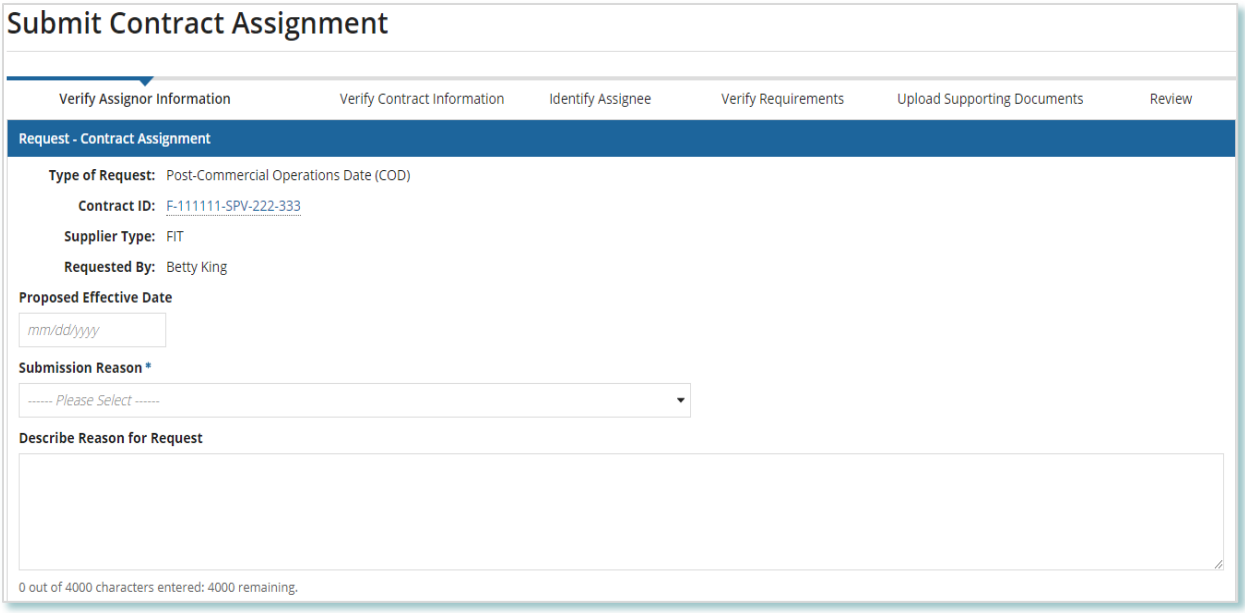


Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name
F-111111-SPV-222-333	FIT	COD	002668	Orange Town Community Farm Ltd.

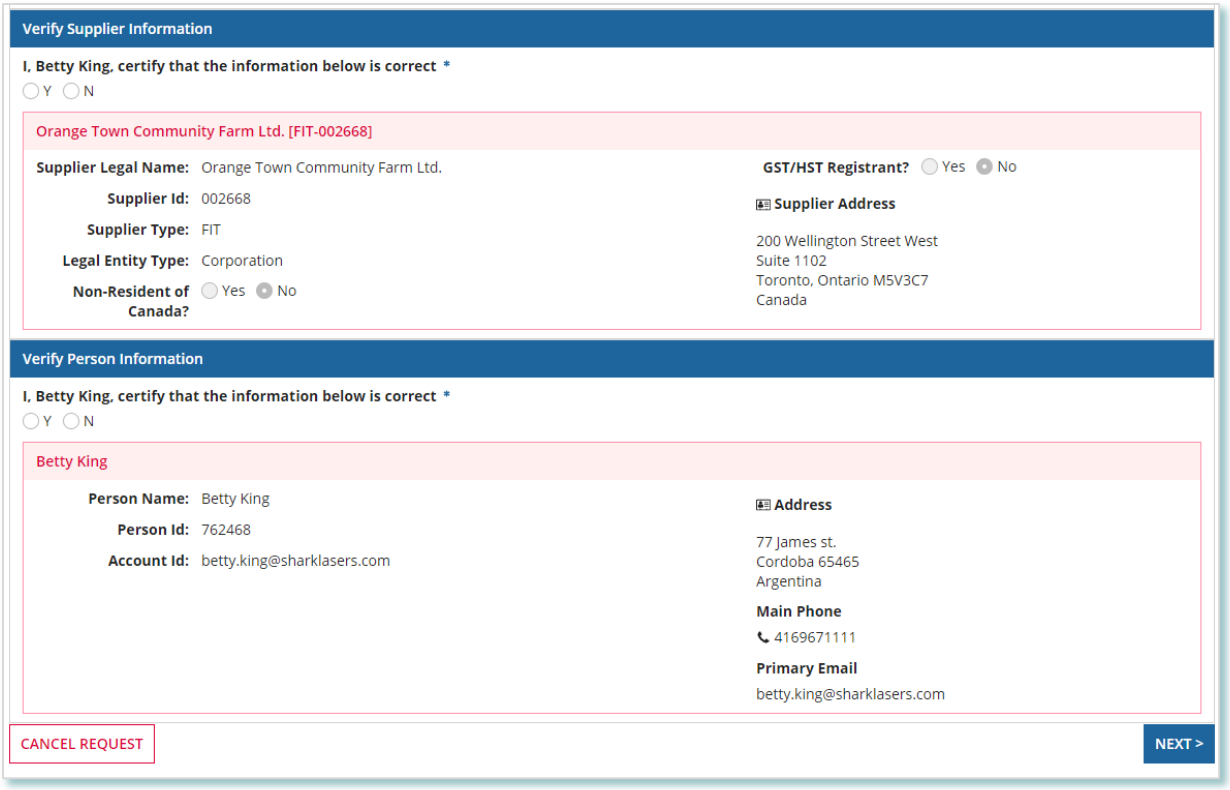
4. Select **Related Actions > Contract Assignment**.



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

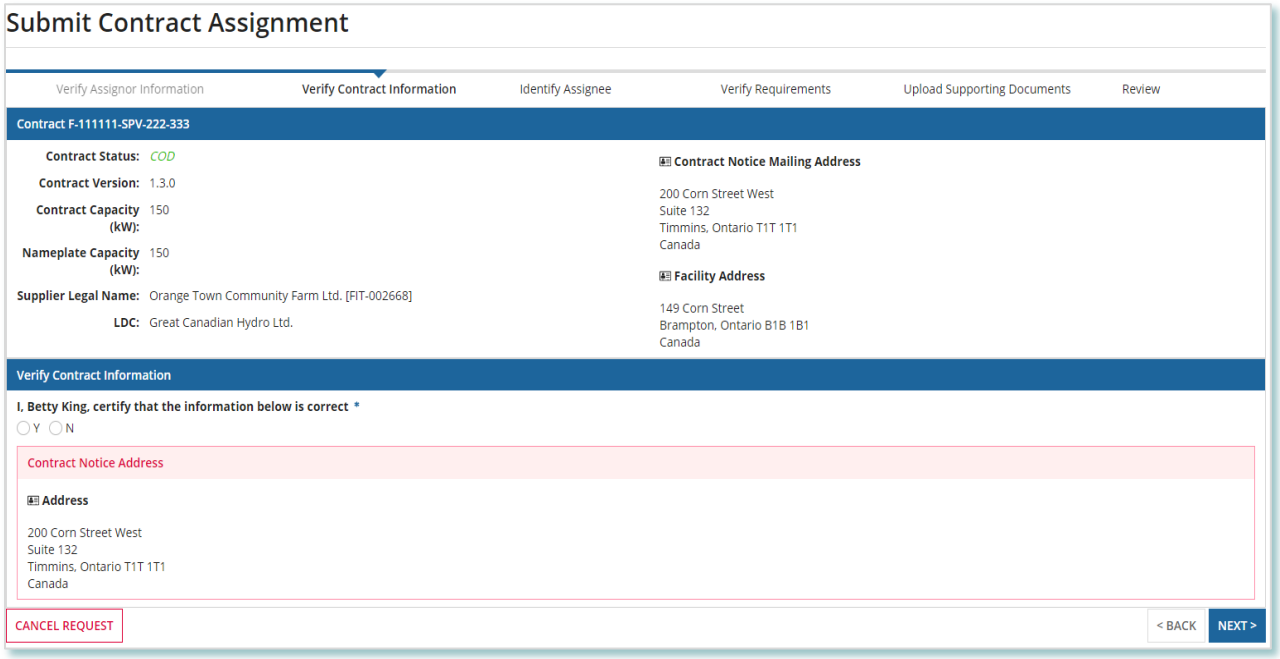


6. Verify both the Supplier and Person information and then select **NEXT**.



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.

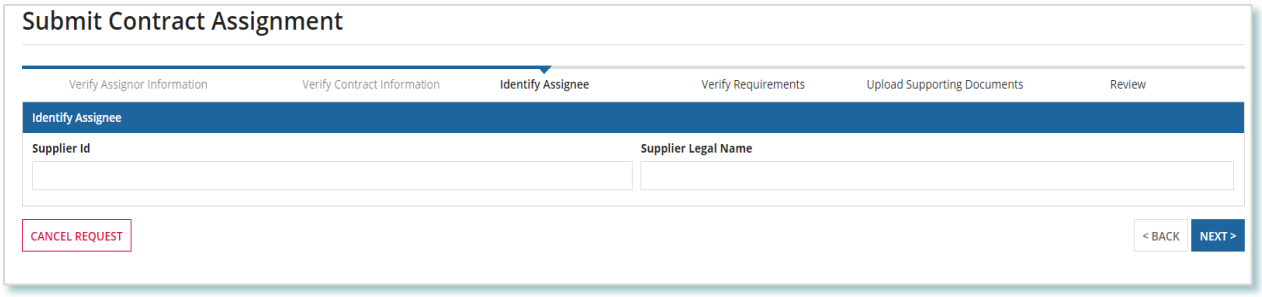
Note: You must confirm that the information is correct to continue.



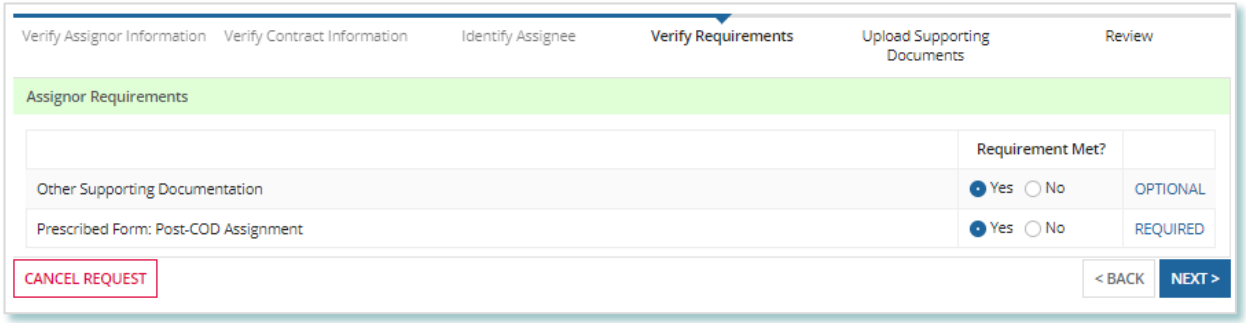
8. Select **NEXT**.
9. On the **Identify Assignee** page, enter the Supplier ID and Supplier Legal Name for the Supplier you want to assign the Contract to, and then select **FIND SUPPLIER**.

Note: The assignee must be a verified Supplier.

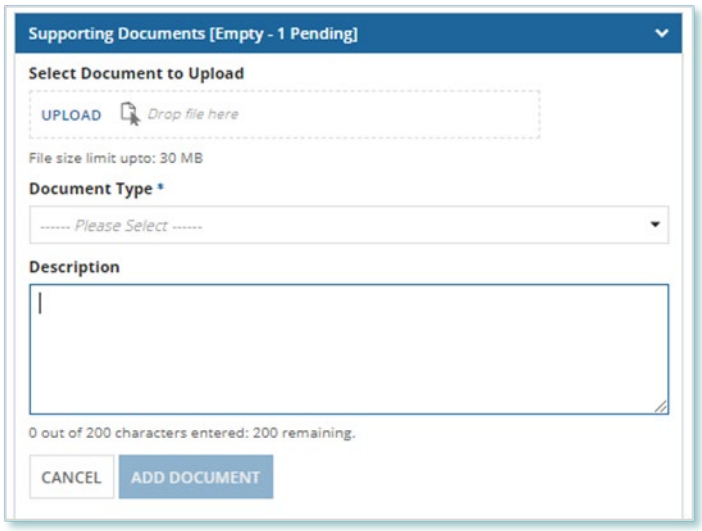
The Supplier ID and Supplier Legal name should be provided to you directly from the Assignee. The Assignee would have this information available only if they have completed the Supplier Registration process.



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

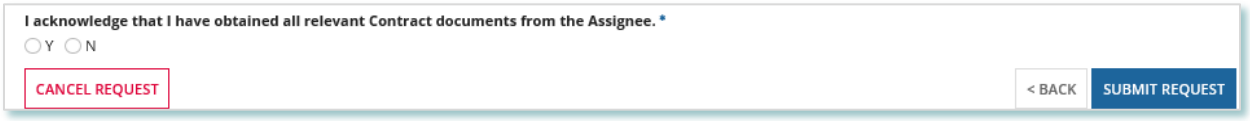


12. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



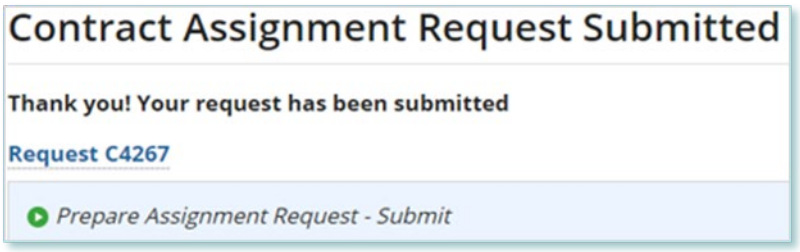
Note: When you submit a Contract Assignment Request, you might be required to submit supporting documentation as evidence of certain information (e.g. prescribed forms, parcel register, land transfer documents, etc.). Any uploaded documents will be visible to both the Assignee and Assignor.

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

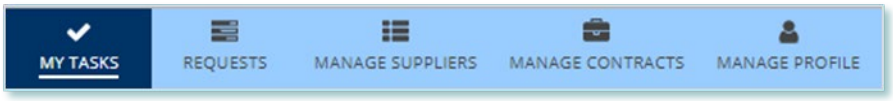


Completing a Post-COD Contract Assignment Request (Assignee)

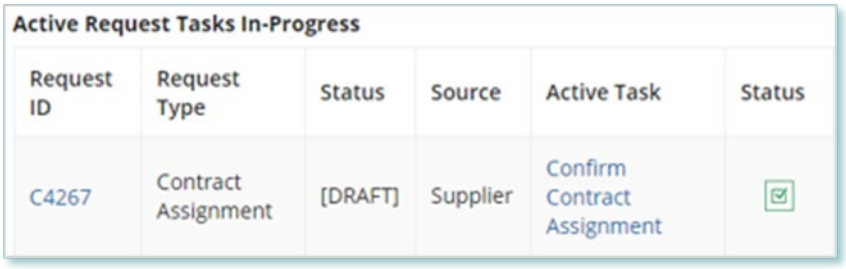
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **My Tasks** tab.

Procedure

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

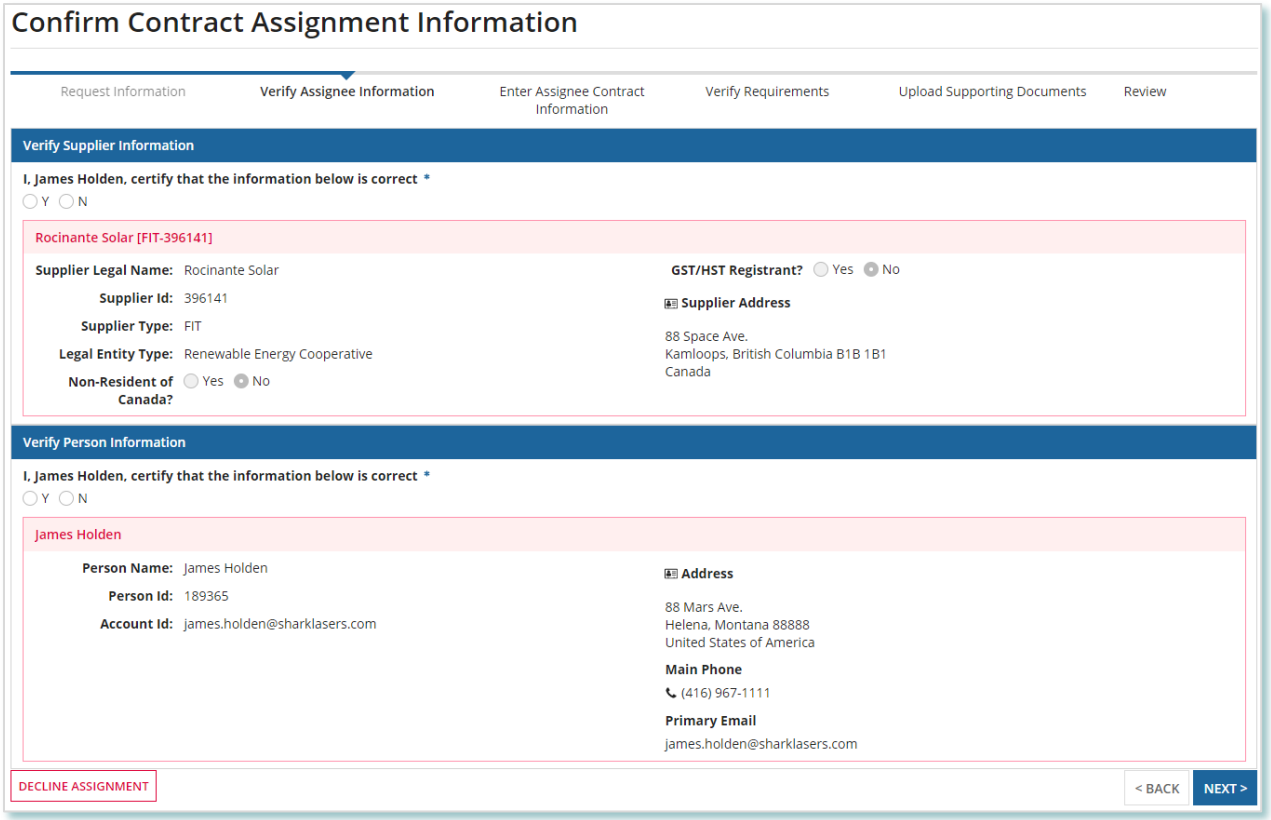


2. Select **Confirm Contract Assignment** for the Request that you want to review. This brings you to the **Request Information** page.



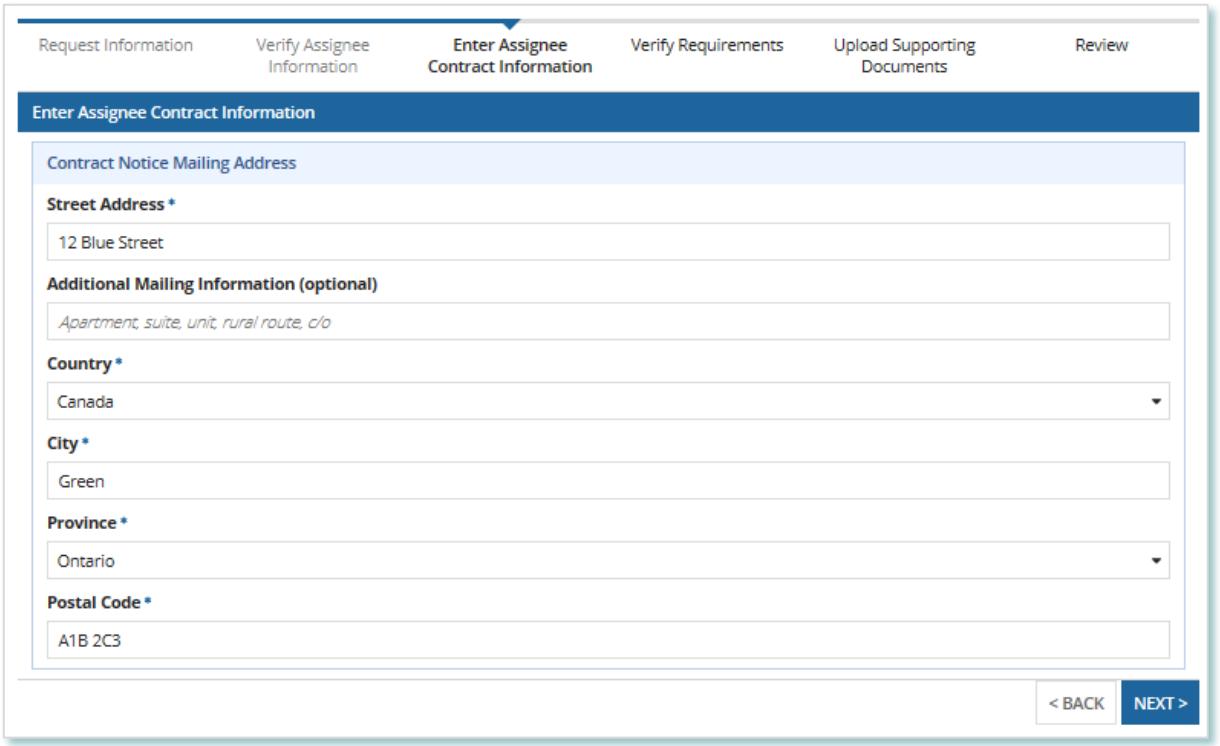
3. Review the information, and then select **NEXT**.
4. Verify the Supplier and Person information on the **Verify Assignee Information** page. If the information is correct, select **Y**. If the information is incorrect, select **DECLINE ASSIGNMENT**, and then correct the information before you proceed with the Contract Assignment Request.

Note: You must confirm that the information is correct to continue.

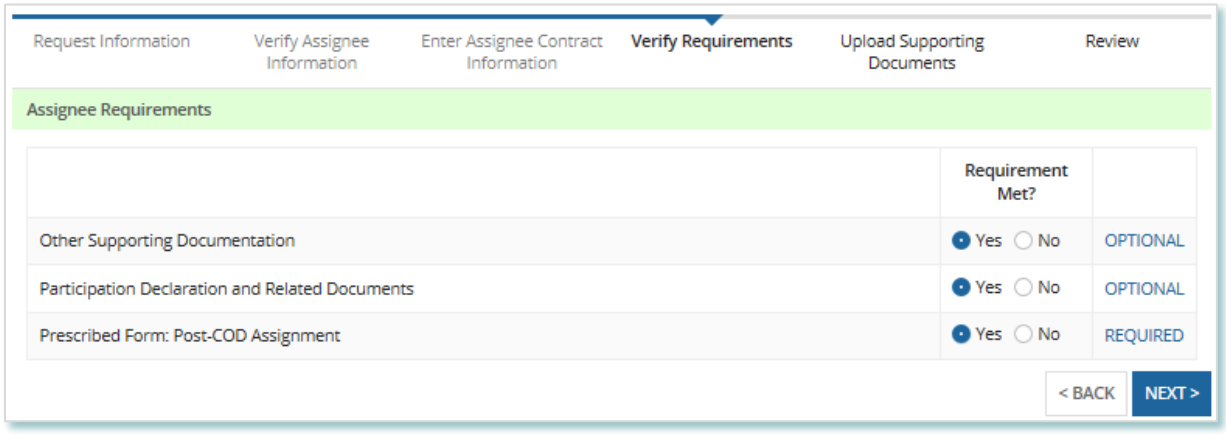


5. Select **NEXT**.

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



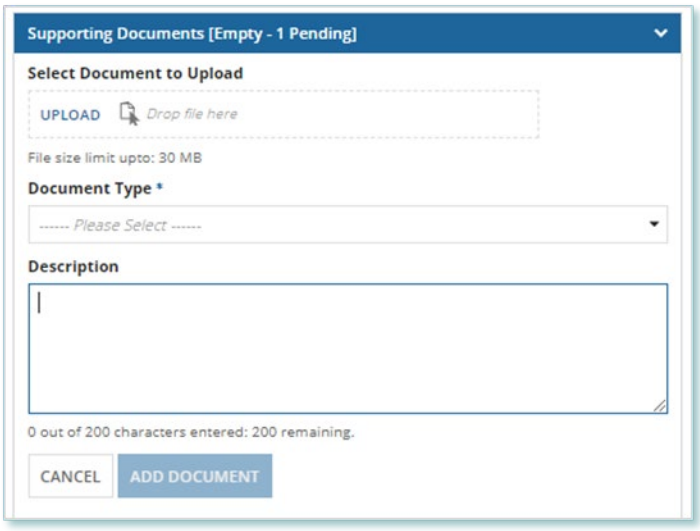
7. Select **NEXT**.
8. On the **Verify Requirements** page, confirm that the Assignee requirements have been met. If required pre-conditions aren't met, complete all of the pre-conditions before you proceed with the Contract Assignment Request.



9. Select **NEXT**.

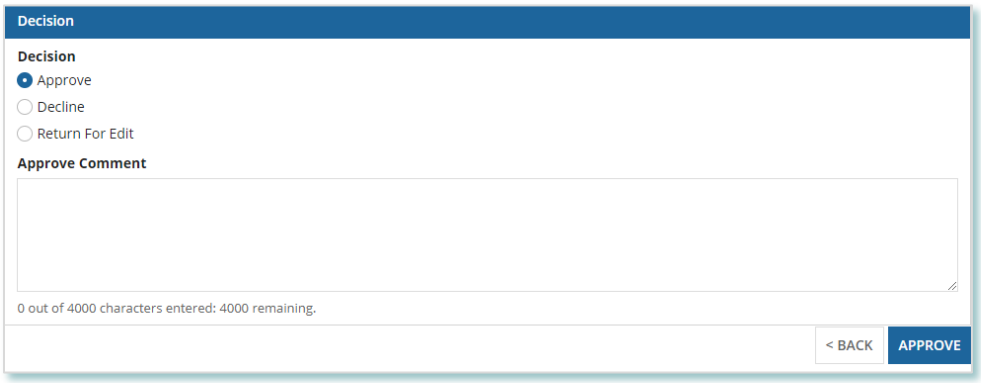
Note: To download and complete the Participation Declaration document, refer to the Prescribed Forms available at https://www.ieso.ca/en/sector-participants/feed-in-tariff-program/contract-management.

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.

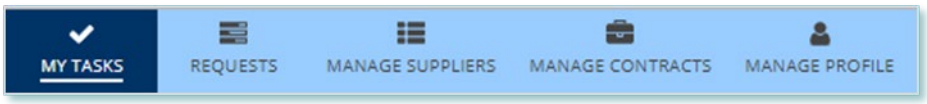


Once the Request is submitted, a confirmation page is displayed. The Request is now under IESO review. Please wait for further instructions from the IESO.

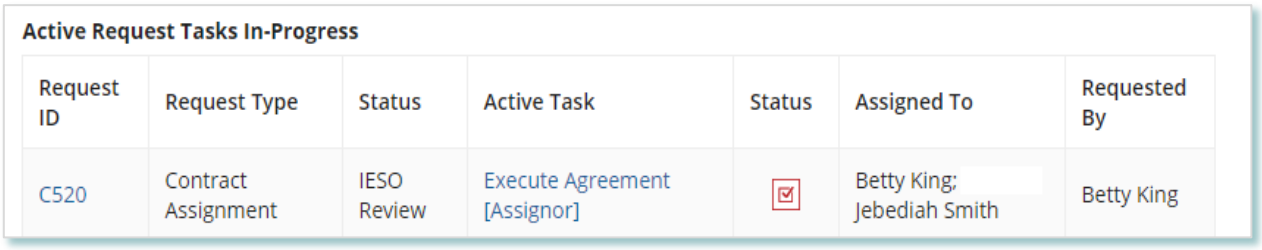
Executing a Post-COD Contract Assignment Agreement (Assignor)

Procedure

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



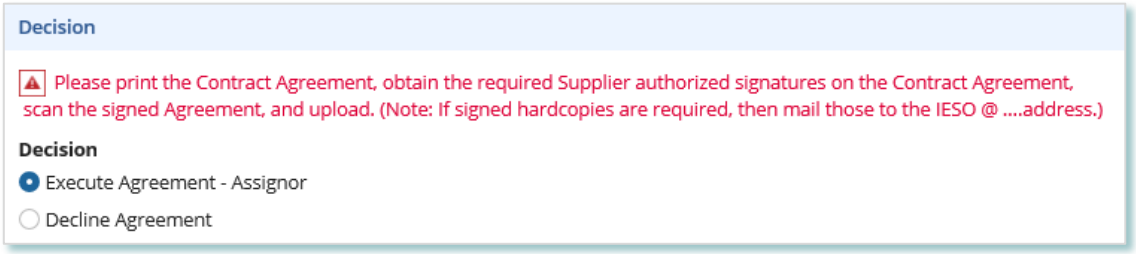
2. Select **Execute Agreement [Assignor]** for the Request that you want to review.



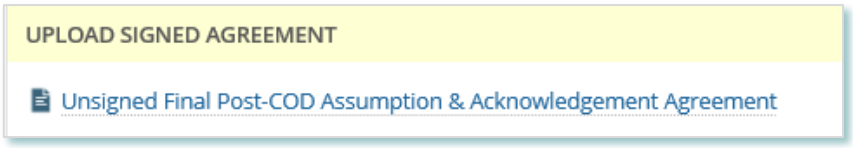
This brings you to the **Execute Assignor Agreement for Contract Assignment** page.

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

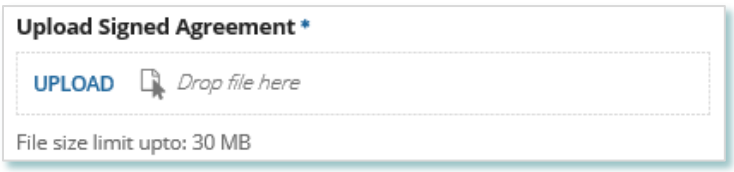
4. Under **Upload Signed Agreement**, choose either **Execute Agreement – Assignor or Decline Agreement**.



   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**.



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**.

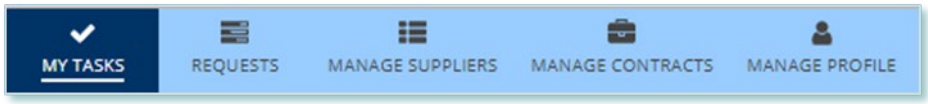
5. A dialog box is opened, select **Yes**.

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

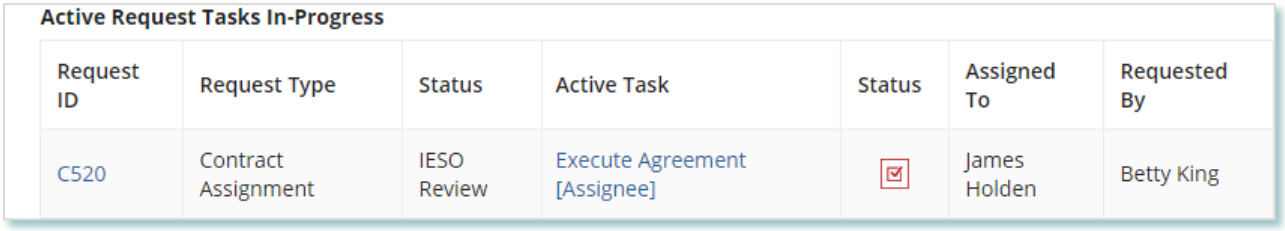
Executing a Post-COD Contract Assignment Agreement (Assignee)

Procedure

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

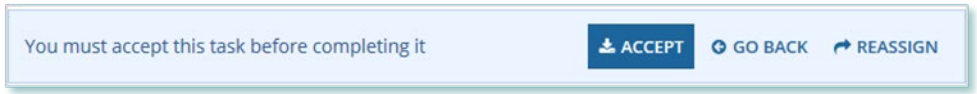


2. Select **Execute Agreement [Assignee]** for the Request that you want to review.

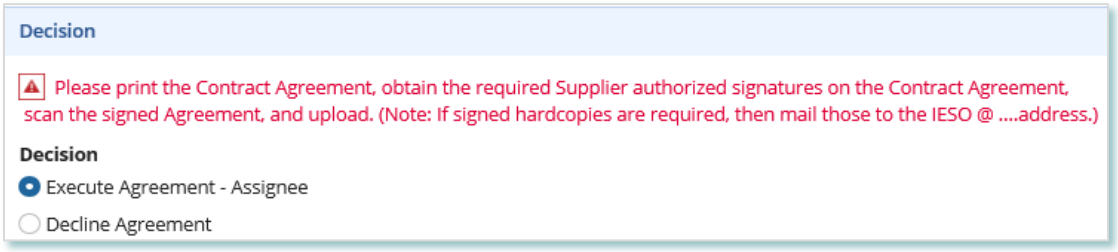


This brings you to the **Execute Assignor Agreement for Contract Assignment** page.

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

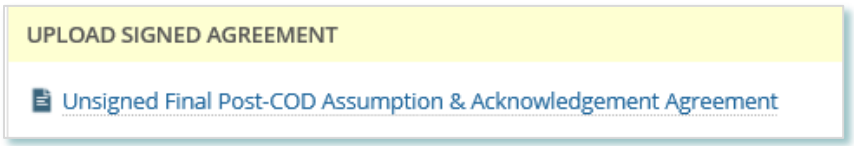


4. Under Upload Signed Agreement, choose either **Execute Agreement – Assignee** or **Decline Agreement**.

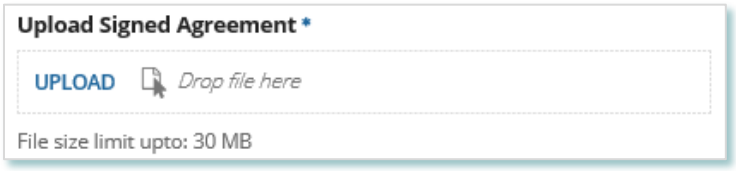


   a. If you select **Execute Agreement – Assignee**, follow these steps:

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



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**.

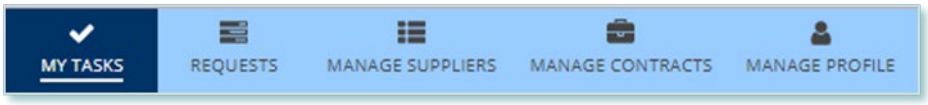
The Request is now under IESO review. Please wait for further instructions from the IESO.

Propose Assignment Effective Date (Assignor)

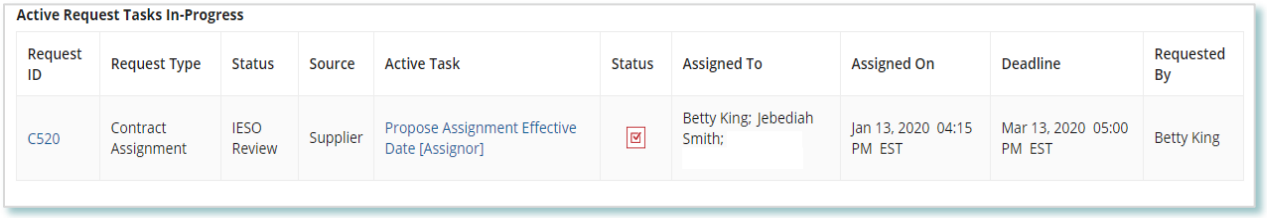
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **My Tasks** tab. The Assignor will be required to submit a proposed Assignment Effective Date. This date should be agreed upon by both parties. This date will be reviewed by the Assignee and ultimately by the IESO.

Procedure

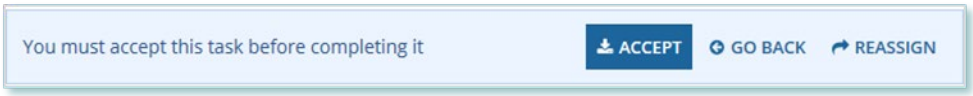
1. Select the **MY TASKS** tab.



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.

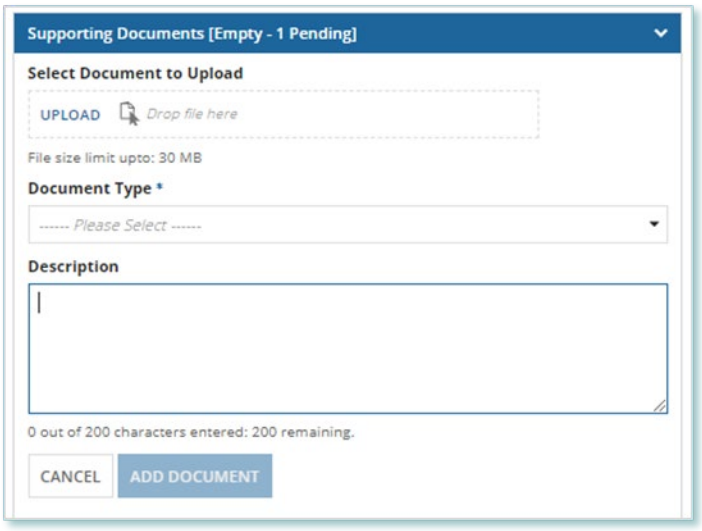


3. If there are multiple Contacts assigned to the task, to begin working on the task, select **ACCEPT**.



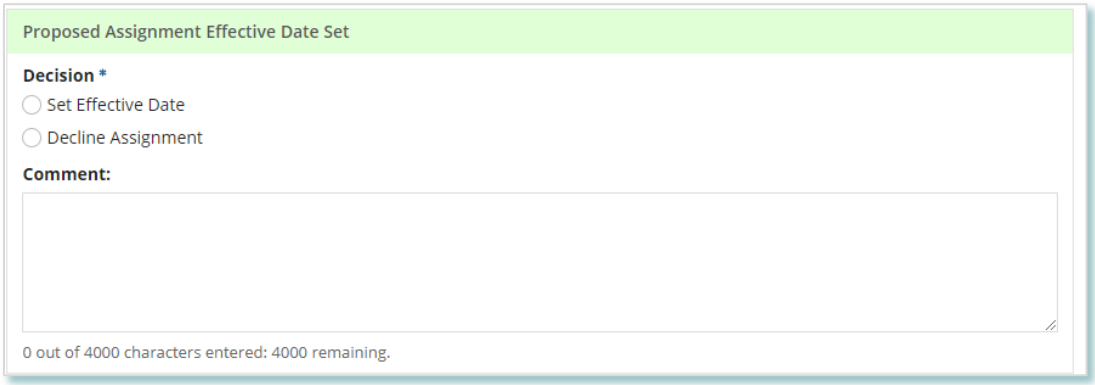
4. Review the Assignment information and select **NEXT**.

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**.

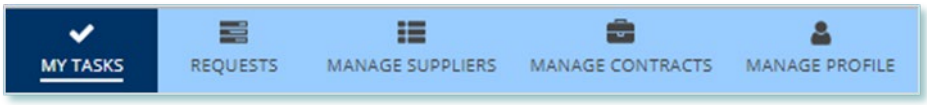
7. A dialog box is opened, select **Yes**.

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

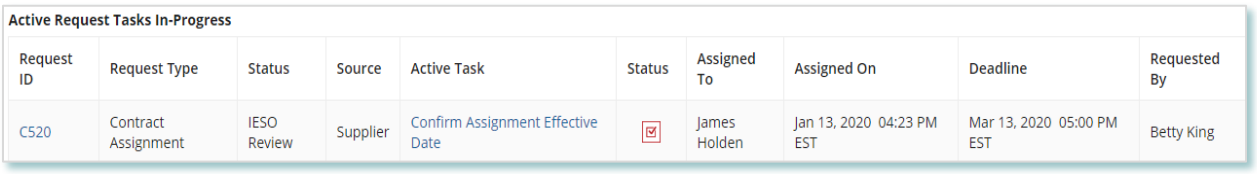
Confirm Assignment Effective Date (Assignee)

Procedure

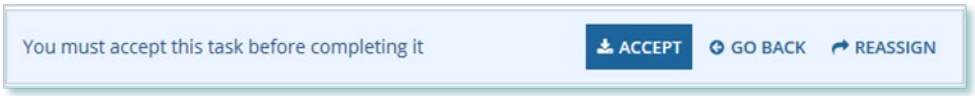
1. Select the **MY TASKS** tab.



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.

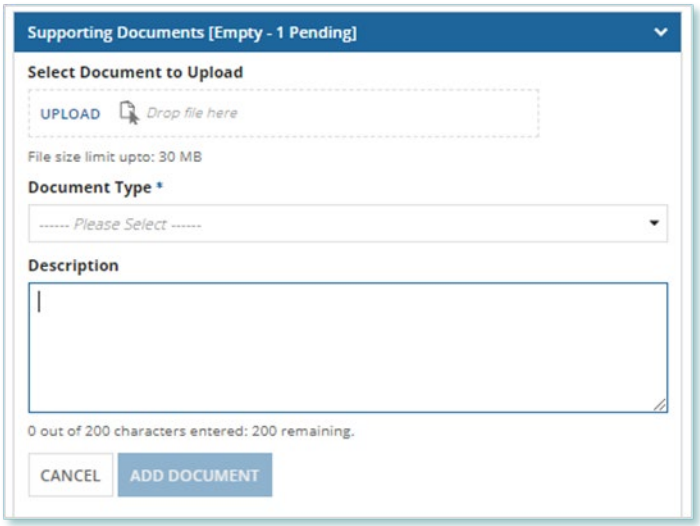


3. If there are multiple Contacts assigned to the task, to begin working on the task, select **ACCEPT**.



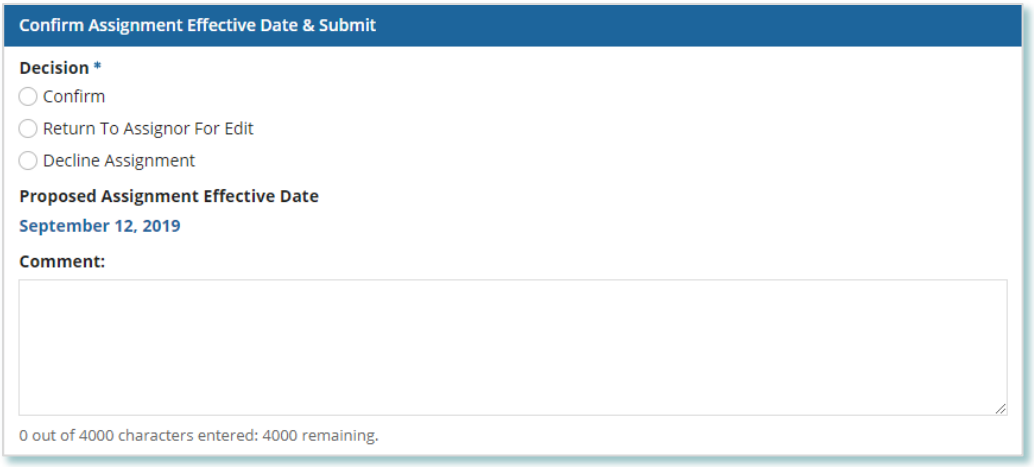
4. Review the Assignment information and select **NEXT**.

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 **Confirm, Return to Assignor for Edit** or **Decline Assignment**.



   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

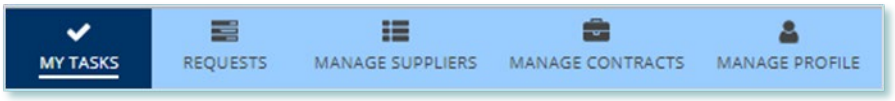
Reviewing Requests Submitted by a Supplier Approver

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.

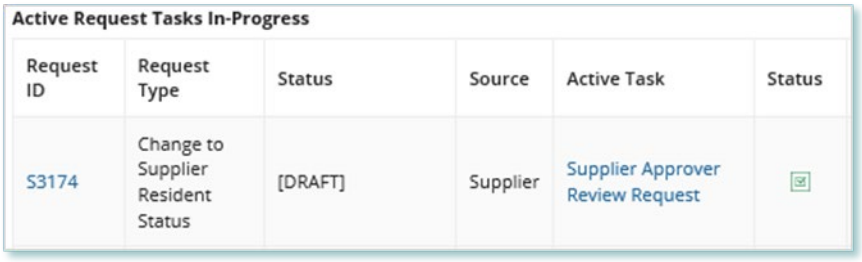
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

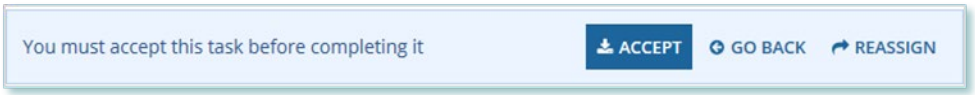
1. Select the **MY TASKS** tab.



2. Select the **Active Task** for the Request that you want to review. This brings you to the **Review** page.

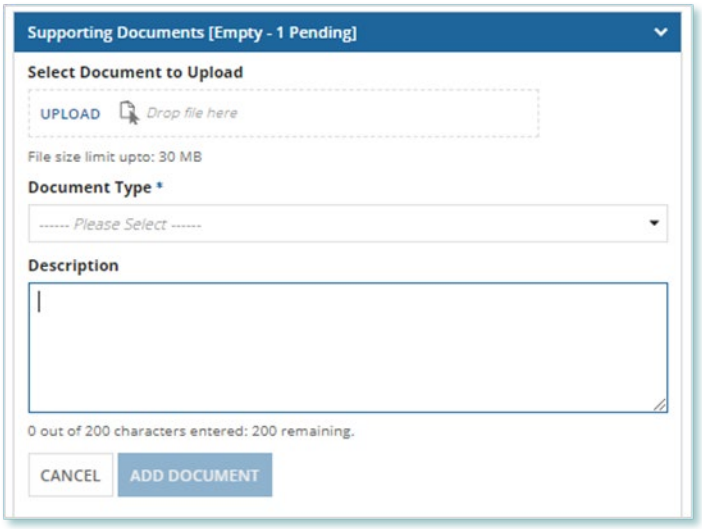


3. To begin working on the task, select **ACCEPT**.

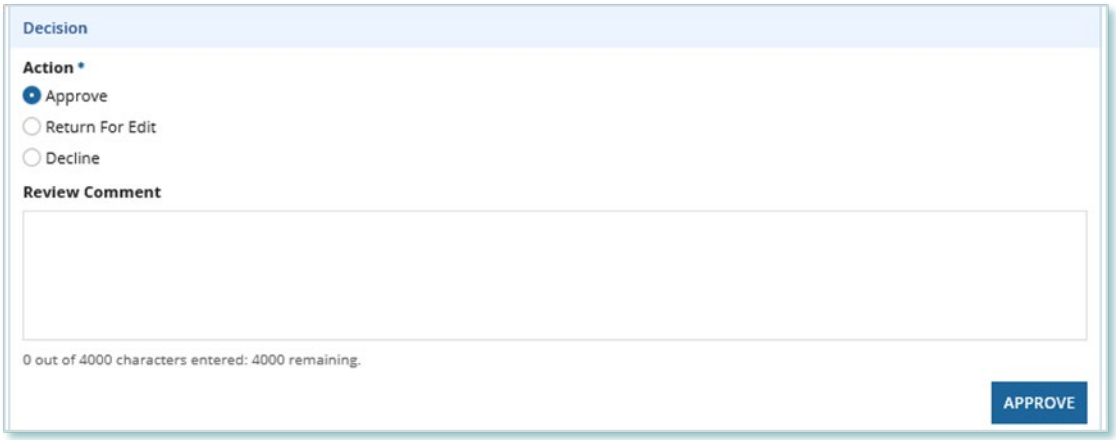


4. Review the values entered and the documents in the Request.

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.

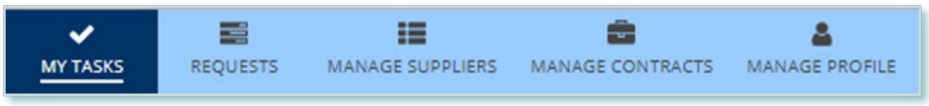
Providing Clarification for Returned Requests

The IESO or a Supplier Approver may return a Request that you submitted back to you for further review.

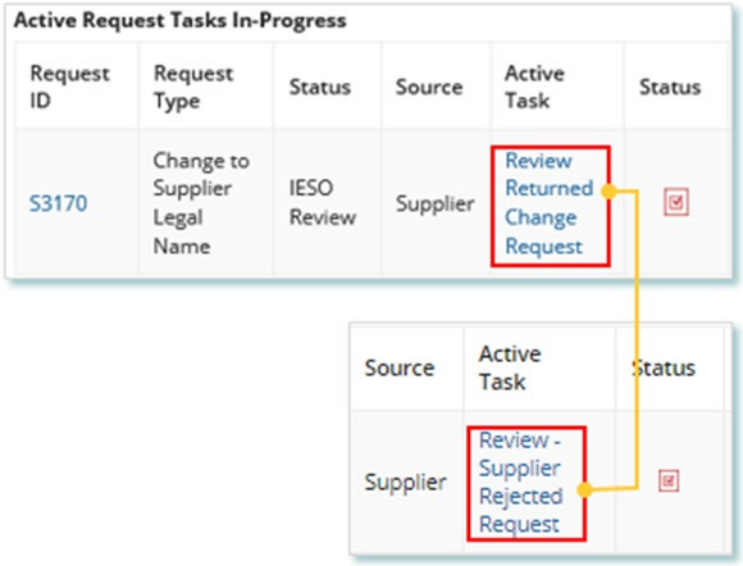
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



2. Select the **Active Task** for the Request you want to work on.

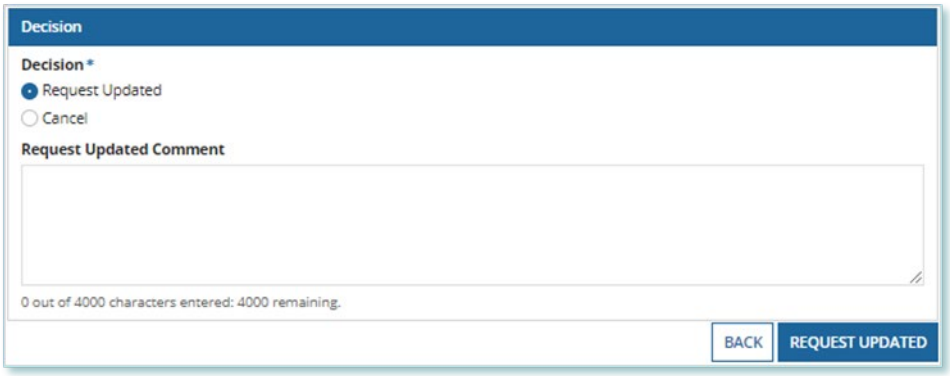


3. On each page, make changes to the fields that require updates.
4. On the **Supporting Documents page**, review any documents added by other users
5. **Optional**: To upload supporting documents, select **+UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.

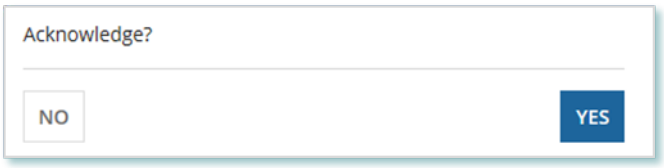
Note: When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

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**.



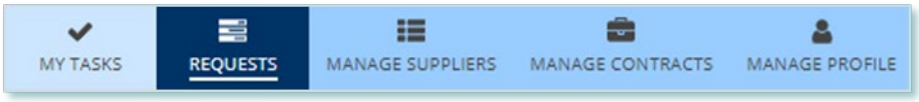
Cancelling a Submitted Request

You can cancel a Request that you submitted.

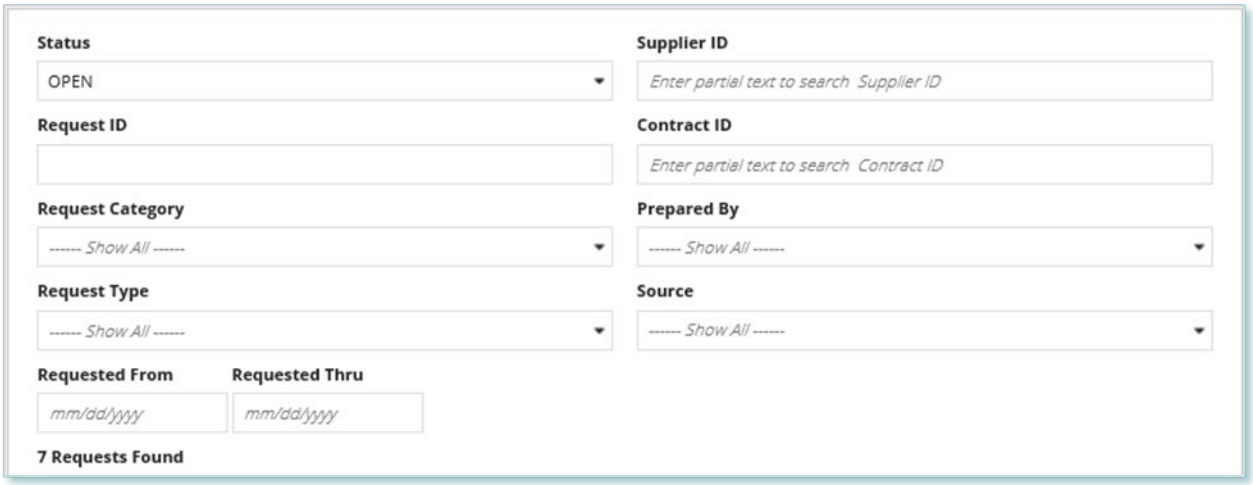
> **Note:** You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

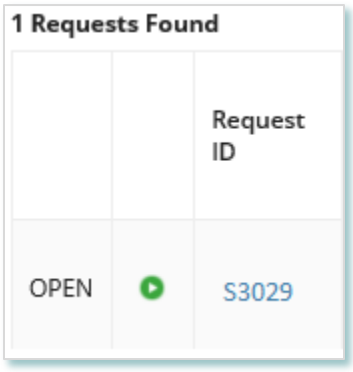
1. Select the **Requests** tab.



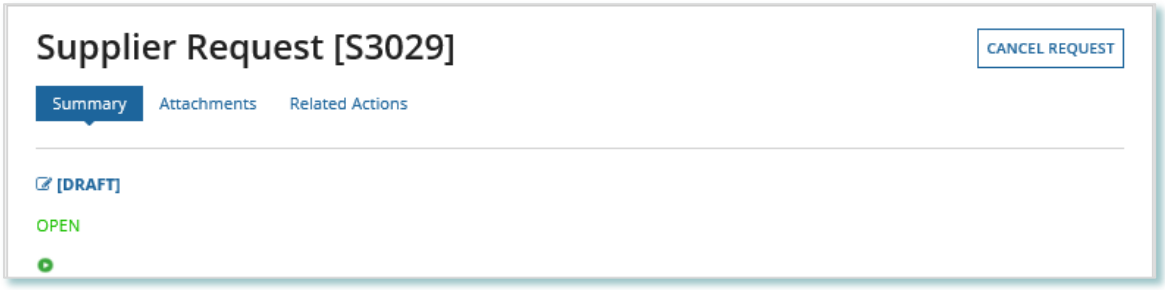
2. **Optional:** Use the filters to search for the Request that you want to cancel.



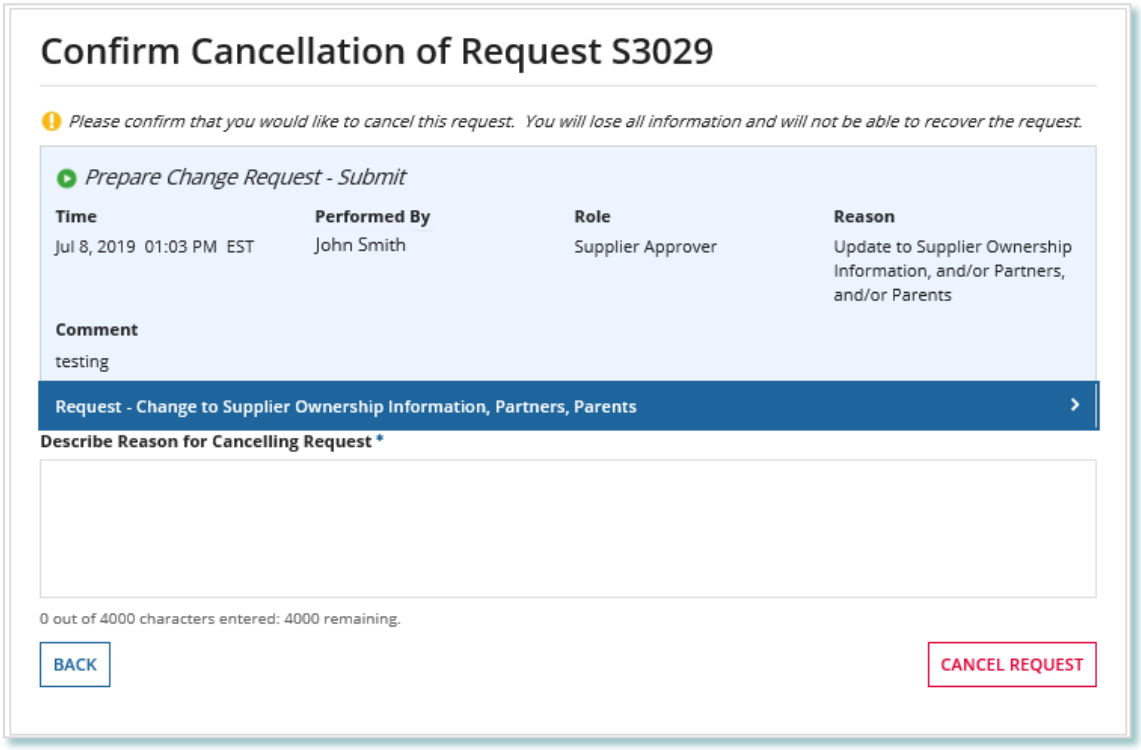
3. Select the **Request ID** to view the Request Record that you want to cancel.



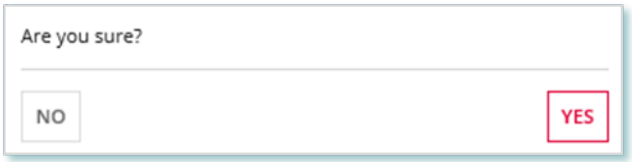
4. Select **CANCEL REQUEST**.



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

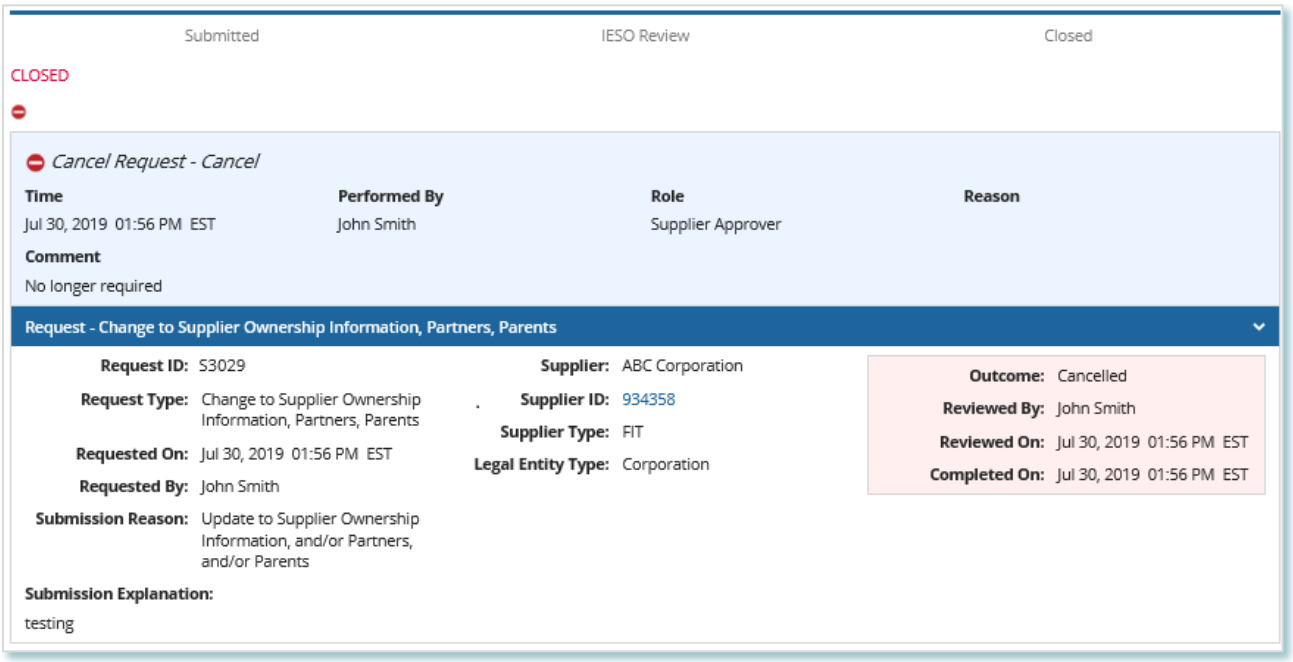


6. Select **CANCEL REQUEST**.
7. A dialog box is opened, select **Yes**.



8. Refresh your page.

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



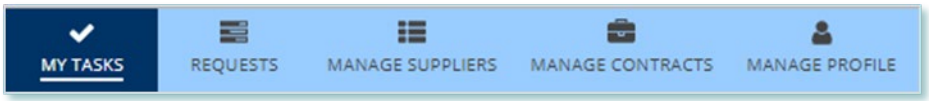
Providing Acknowledgement of a Request Outcome

If the IESO approves or declines your Request, you may receive a **Provide Acknowledgement** task where you must acknowledge the IESO's decision.

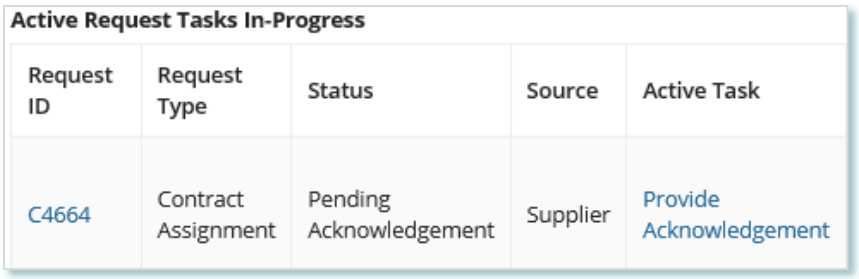
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you under **MY TASKS**.

Procedure

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

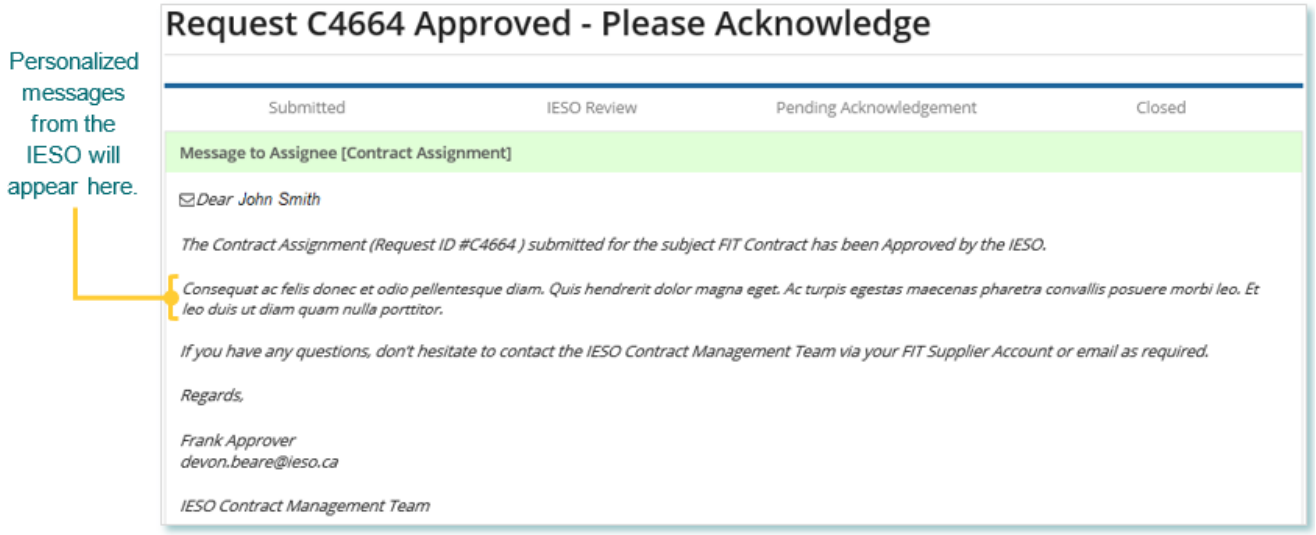


2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.



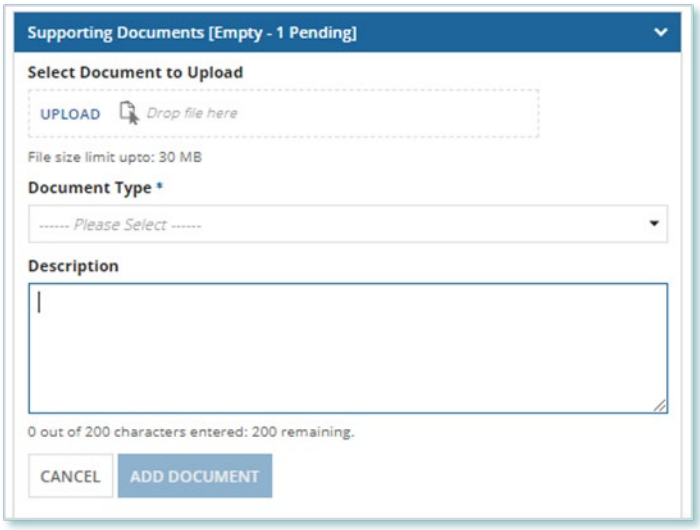
Active Request Tasks In-Progress

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

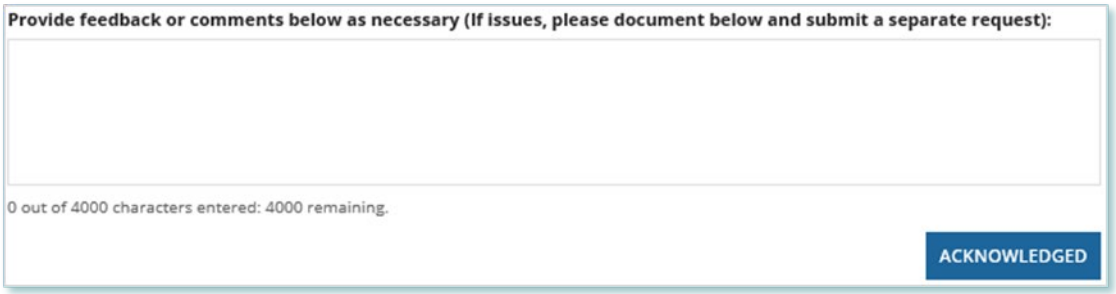


3. Review the information and any documents added by other users.

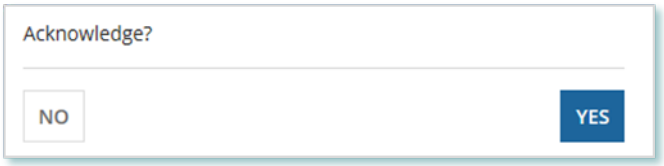
4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



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**.

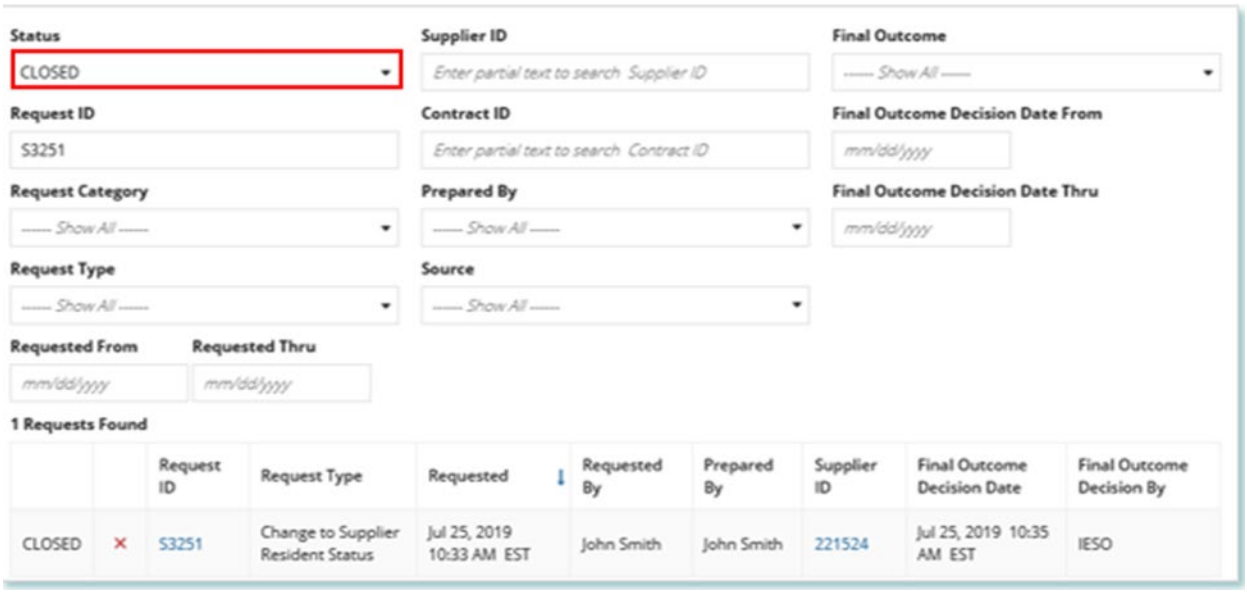


Viewing Request Notifications

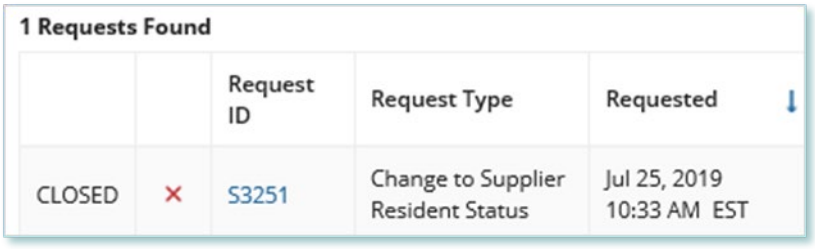
When a decision has been made by the IESO for a Request, you may receive a notification message and/or document that can be found in your Request records.

Procedure

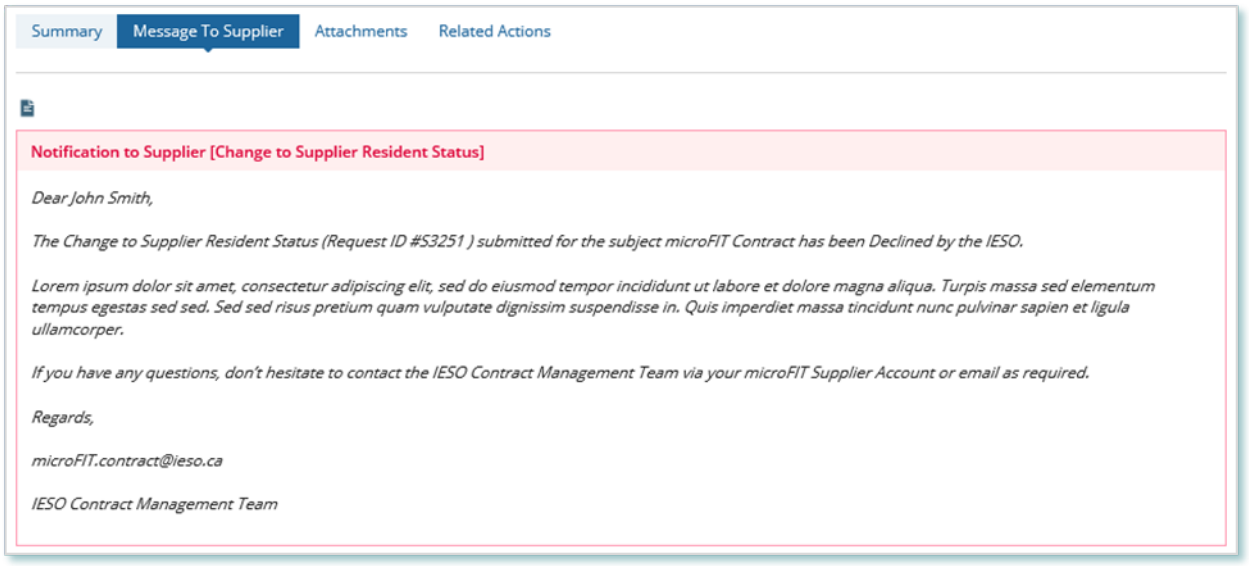
1. Select the **REQUESTS** tab.
2. In the **Request Search** section, change Status to **CLOSED**.
3. **Optional:** Use the other filters to search for the Request record you want to view.



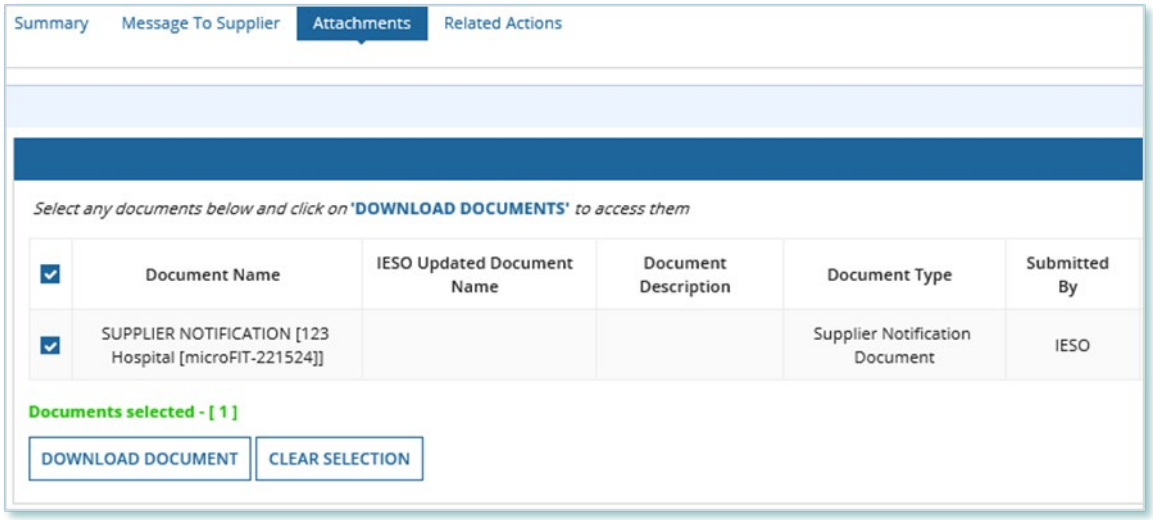
4. Select the **Request ID** to view the Request Record.



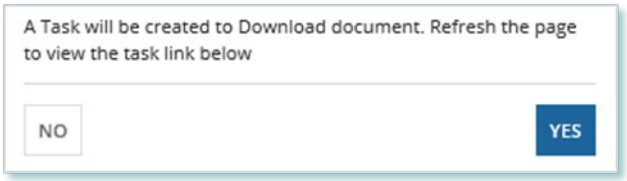
5. To see notification messages from IESO, select the **Message to Supplier** tab.



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

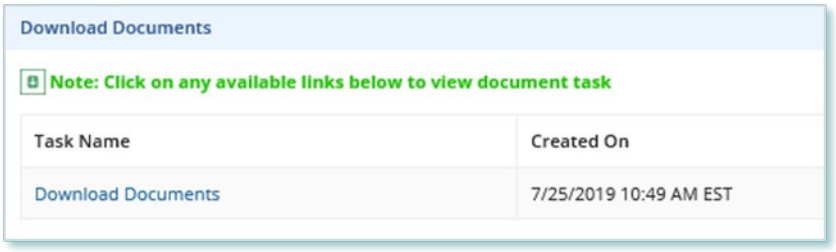


7. Check the box for the notification document, and then select **DOWNLOAD DOCUMENT**.
8. A dialog box is opened, select **Yes**.



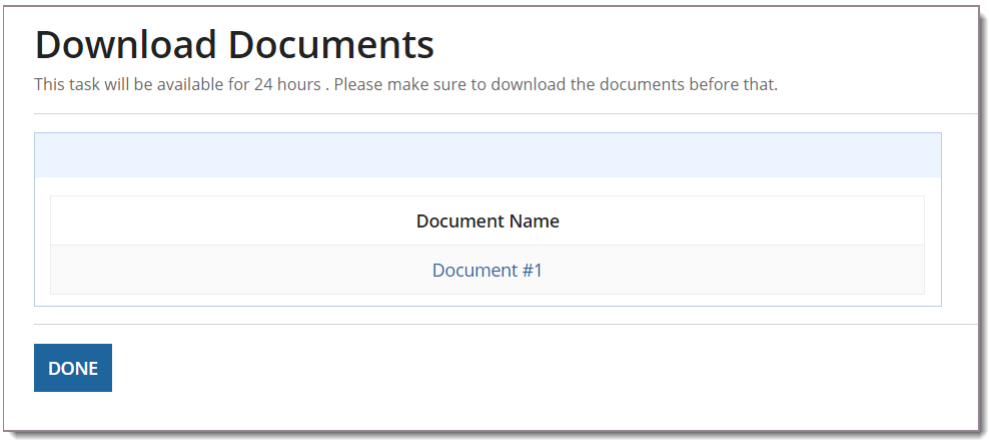
9. Refresh your page.

10. Select **DOWNLOAD DOCUMENTS**.

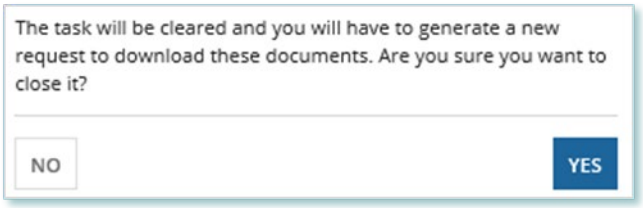


11. Select a document name to begin downloading it.

Note: These documents will be available for download for 24 hours.



12. Select **DONE**.
13. A dialog box is opened, select **Yes**.

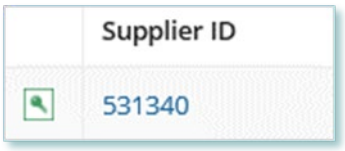


Downloading and Saving Documents

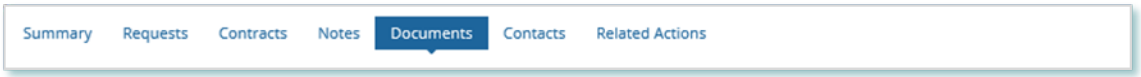
For your records, you can download and save documents related to your Suppliers, your Contracts, your profile account and/or any related Requests submitted.

Procedure

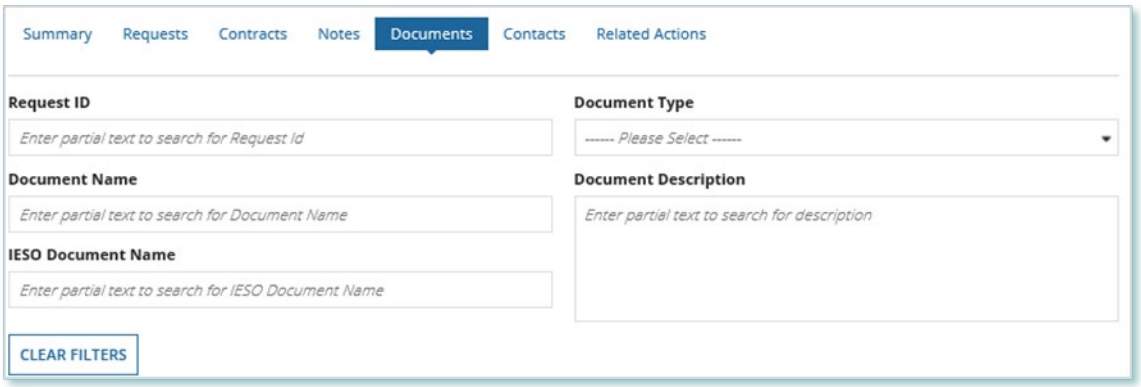
1. Select the tab that contains the Record you want to view.
    a. To download a Supplier document, select the **Manage Suppliers** tab.
    b. To download a Contract document, select the **Manage Contracts** tab.
    c. To download a Person document, select the **Manage Profile** tab.
2. Select the **ID** for the Record that you want to view.



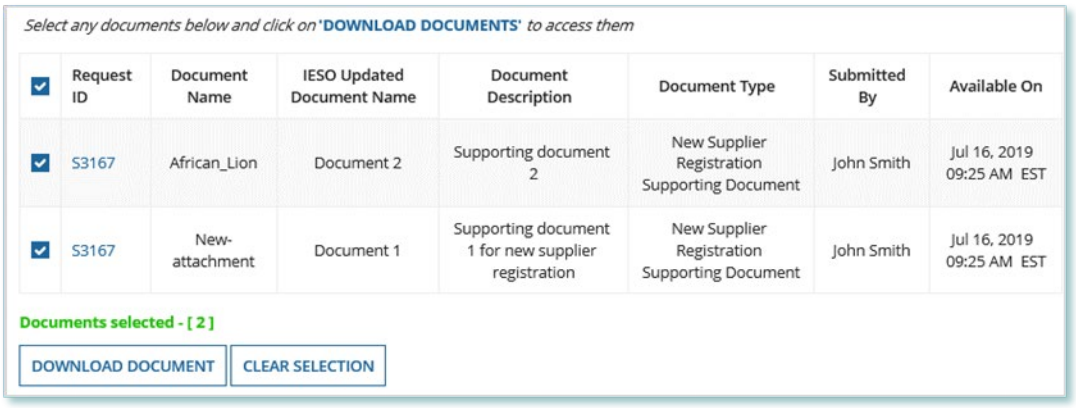
3. Select the **Documents** tab.



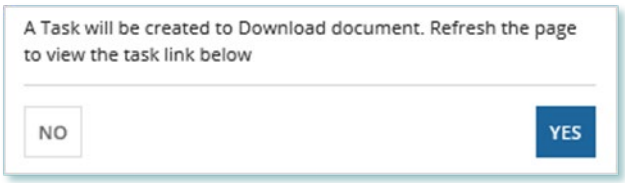
4. **Optional:** Use the filters to find a document that you want to download.



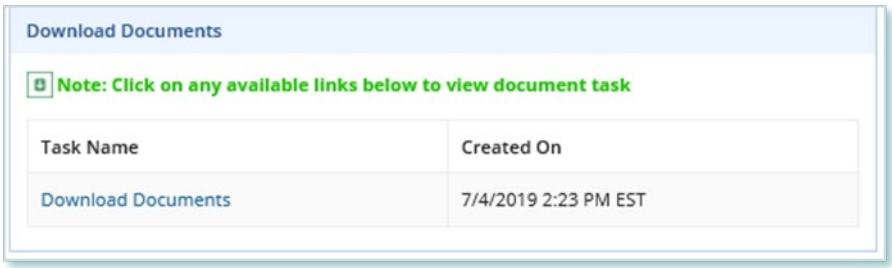
5. Check the box(es) for the document(s) that you want to download.



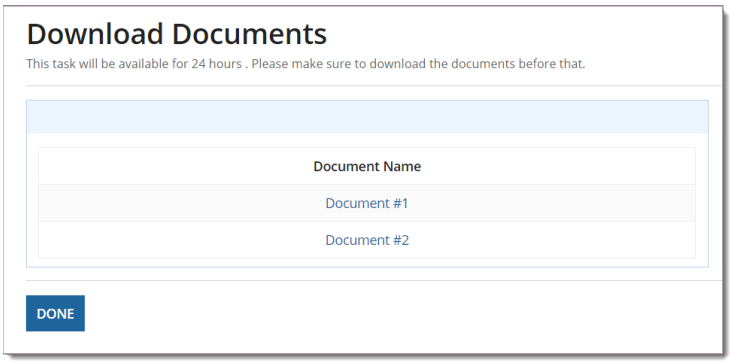
6. Select **DOWNLOAD DOCUMENT**.
7. A dialog box is opened, select **Yes**.



8. Refresh your page.
9. Select **Download Documents**.

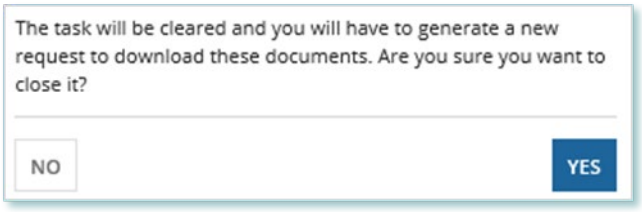


10. To begin saving documents, select the document name for the document(s) that you want to download.



Note: These documents will be available for download for 24 hours.

11. Select **DONE**.
12. A dialog box is opened, select **Yes**.



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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