Beacon FIT Supplier

Digital User Guide
Person Management

Connecting Today.
Powering Tomorrow.

Table of Contents

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.**

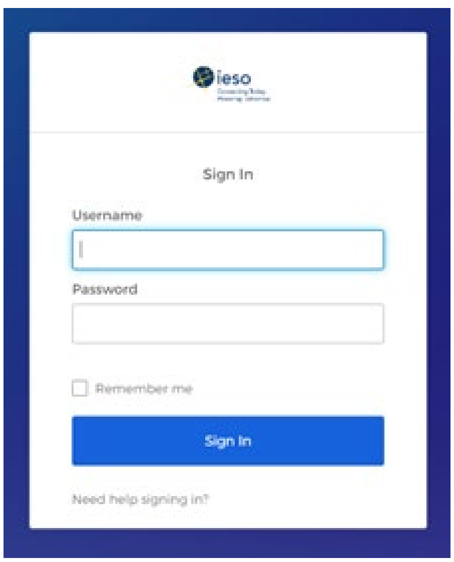
Role	Description
IESO CM FIT Senior Analyst	The IESO CM FIT Senior Analyst is responsible for regular review and processing of requests submitted by the Supplier Approver to the IESO. The IESO CM FIT Senior Analyst can also initiate certain requests that are to be reviewed by the Supplier Approver.
IESO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

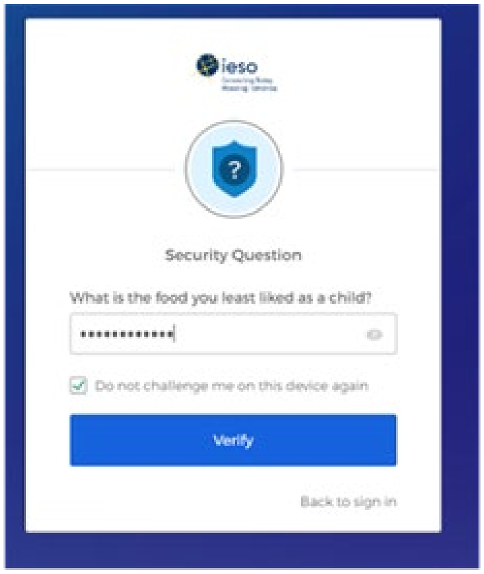
To begin managing your FIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.

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

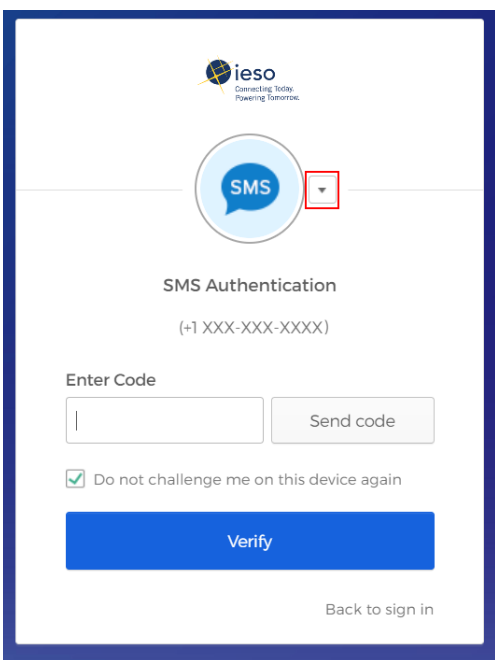


3. If you have set up Security Question Authentication you will be prompted to provide the answer to your security question. Note that the answer is case sensitive. Type in the answer to your security question that you set when you initially registered and click "Verify".

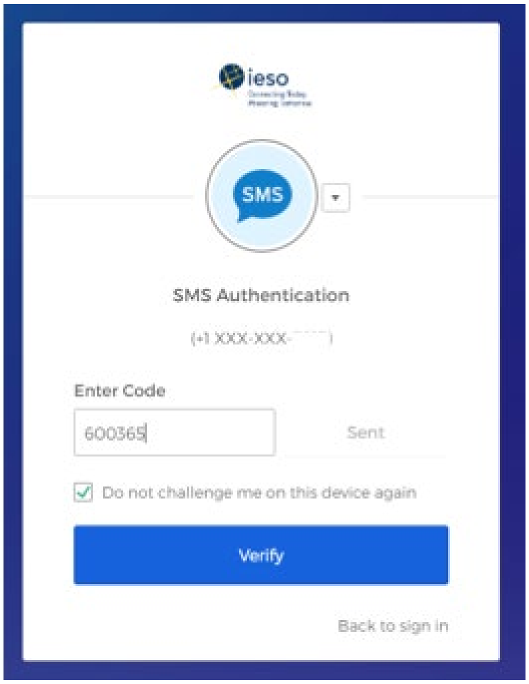


4. If you have set up SMS Authentication in addition to Security Question Authentication, you can choose which factor you will verify to login. One of the two will appear by default and you can switch to the other factor by selecting the drop-down menu arrow next to the authentication icon. You only have to verify one factor to login.

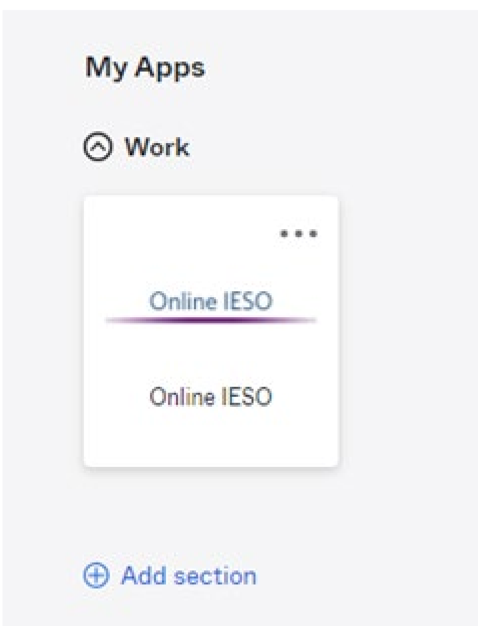
   To continue with SMS Authentication, select "send code". You will receive a numeric code via text message to your mobile phone.



5. Then enter the code you receive through text message and click "Verify".



6. On your user dashboard, select the tile that says "Online IESO".

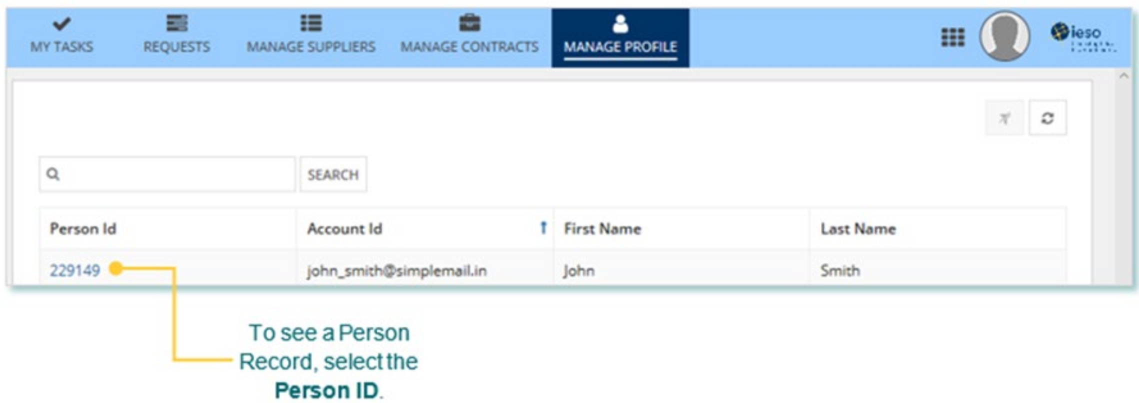


7. Next you will be brought to the Available Programs dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.

Person Overview

Manage Profile Page

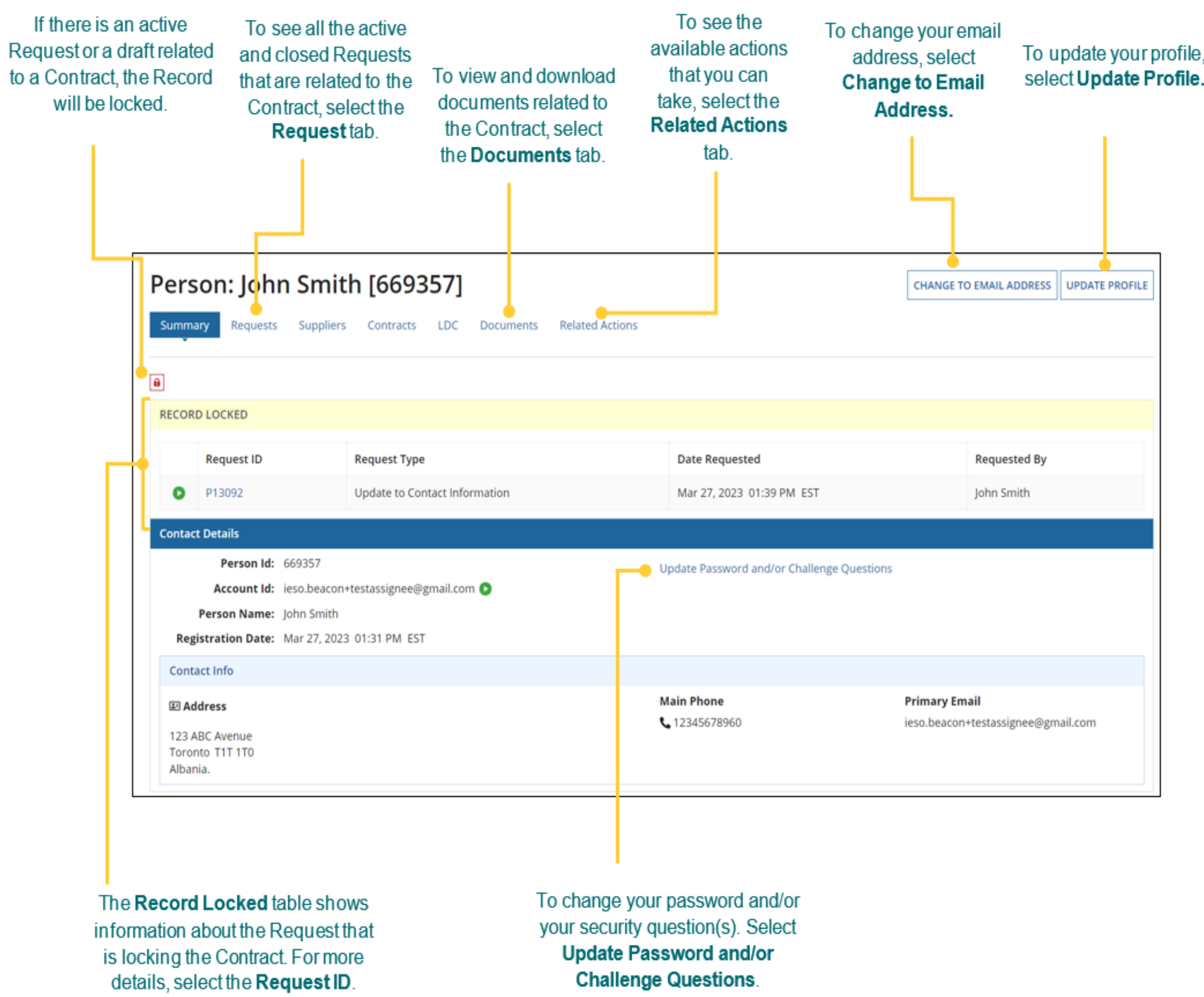
On the **MANAGE PROFILE** page you'll see your basic account profile information.



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



Managing Person Requests

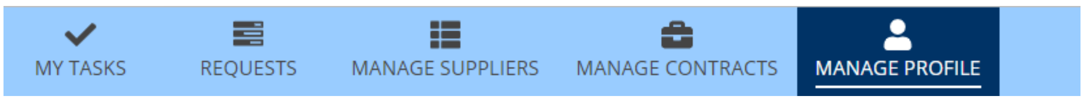
Changing Your Email Address

During the term of your FIT Contract(s), there might be changes to the email address associated with the Person record.

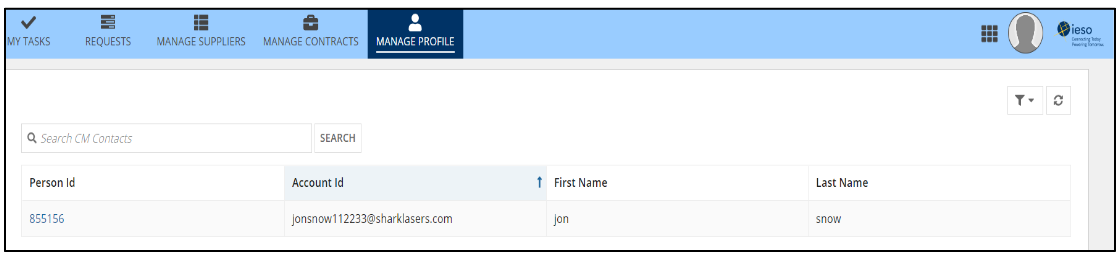
The following instructions will guide you through how to change the email address associated with the Person record in Beacon.

Procedure

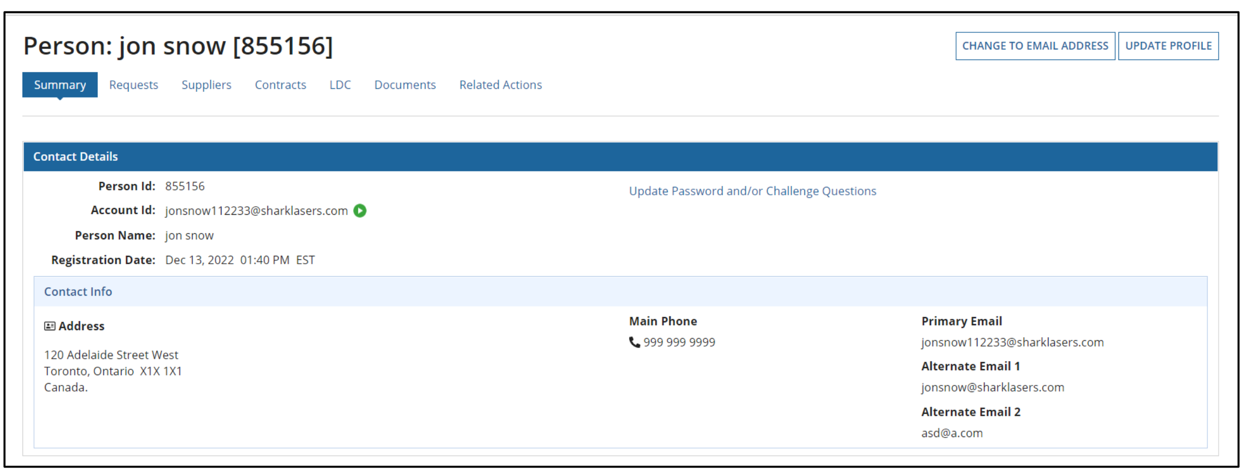
1. Select the **MANAGE PROFILE** tab.



2. Select the **Person Id**.

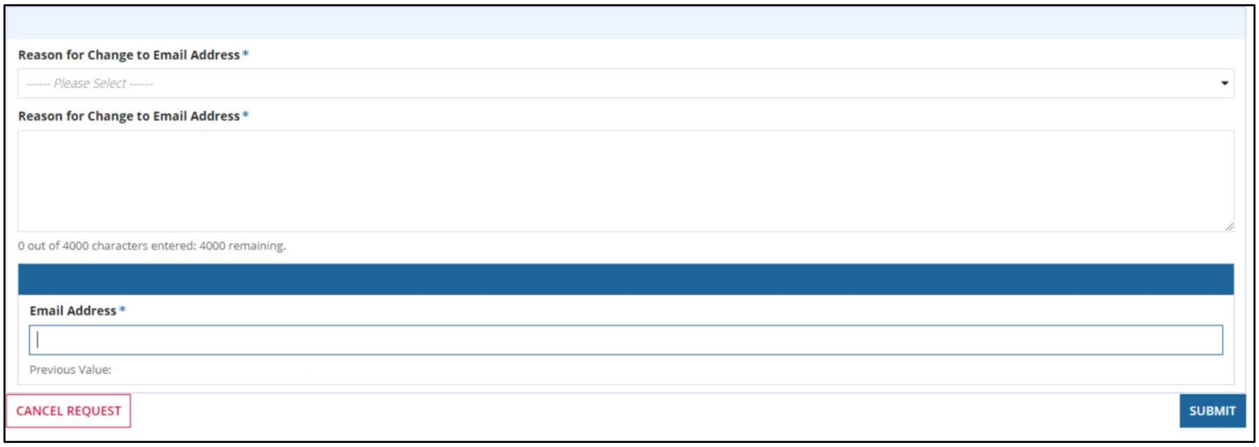


3. Select **CHANGE TO EMAIL ADDRESS** on the top right corner.



4. Under the **Reason For Change Email To Email Address** dropdown, select **Email Address is outdated/inactive**.

5. Enter a description in the **Reason for Change to Email Address**.
6. Enter the new email addres in the **Email Address** field.
7. Click **SUBMIT**



8. Once approved by the IESO, an email will be sent to the email address with instructions on how to log on using the new email address.

Adding or Removing Contacts from Suppliers or Contracts

During the term of your FIT Contract(s), there might be changes to the Contacts who manage your Supplier(s) and/or Contract(s) project.

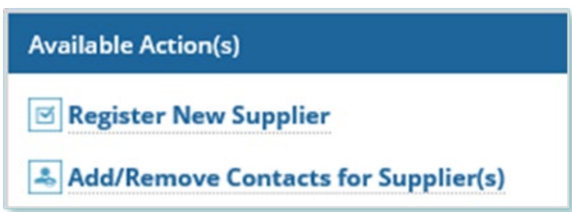
The following instructions will guide you through how to Add and/or Remove Contacts from Supplier(s) or Contract(s) in Beacon.

Adding Supplier Contacts to Supplier

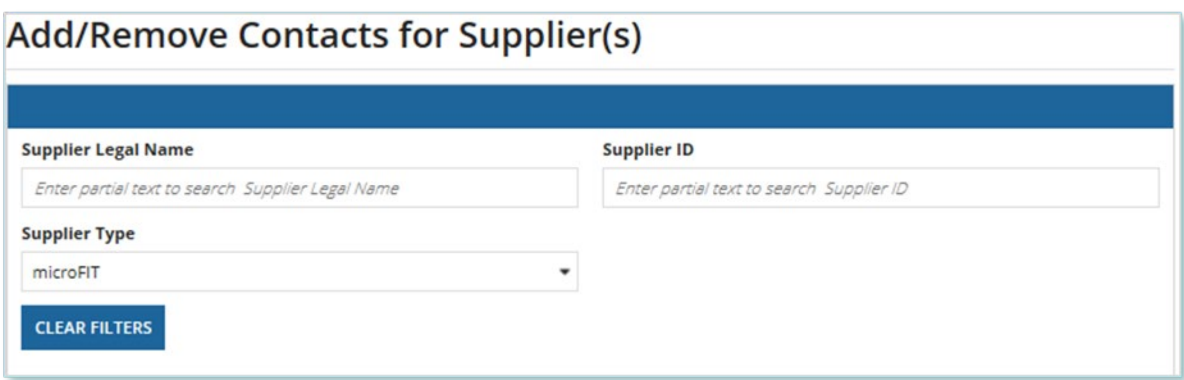
Procedure

1. Select the **MANAGE SUPPLIERS** tab.

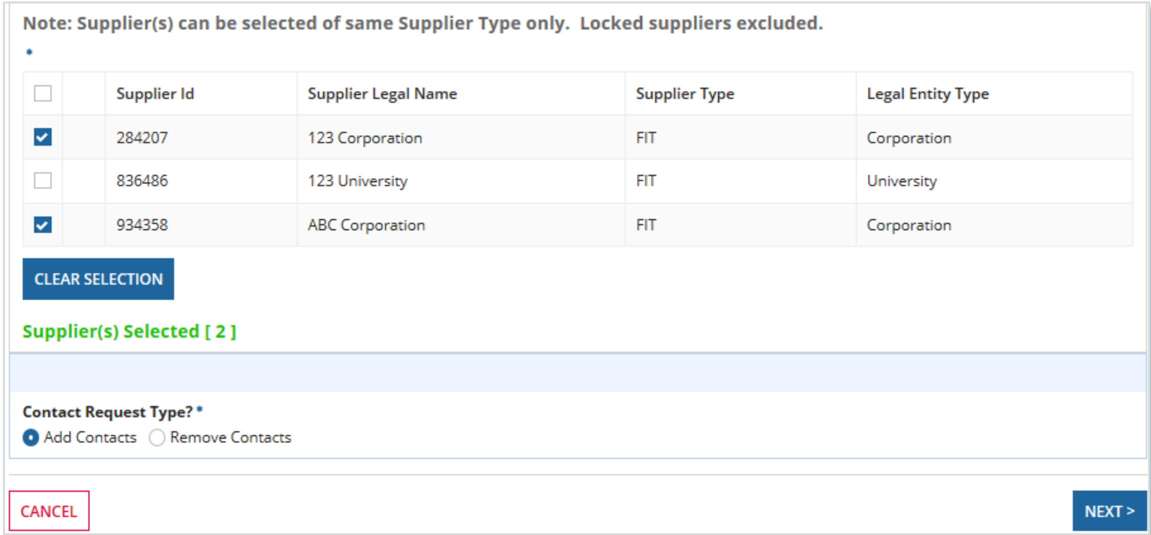
2. Select **Add/Remove Contacts for Supplier(s)**. This brings you to the **Add/Remove Contacts for Supplier(s)** page.



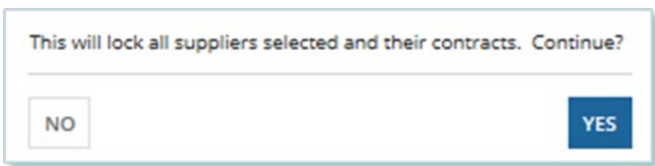
3. **Optional:** Use the filters to search for the Supplier(s) that you want to add.



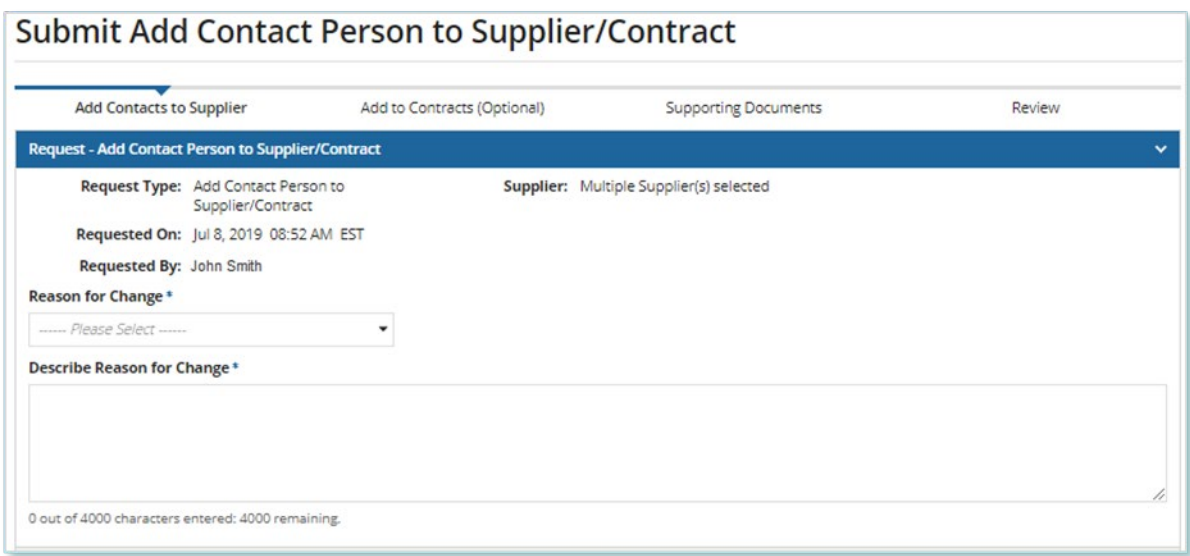
4. Check the box(es) for the Supplier(s) that you want to add.



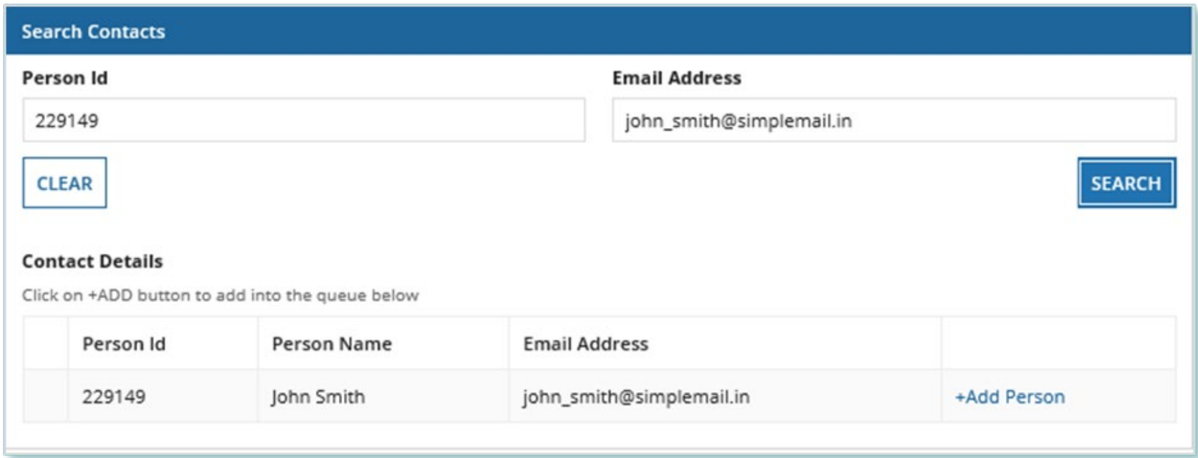
5. Select Add Contacts and then select **NEXT**.
6. A dialog box is opened, select **Yes**.



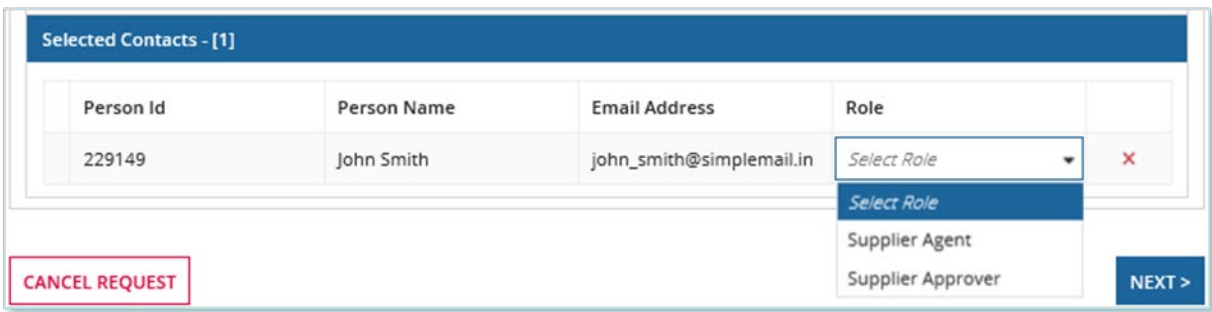
7. On the **Add Contacts to Supplier** page, choose a reason for submitting the Request, and then enter a description for your Request.



8. Enter the **Person ID** and email address for the Contact that you want to add, and then select **SEARCH**.
9. Select **+Add Person**.

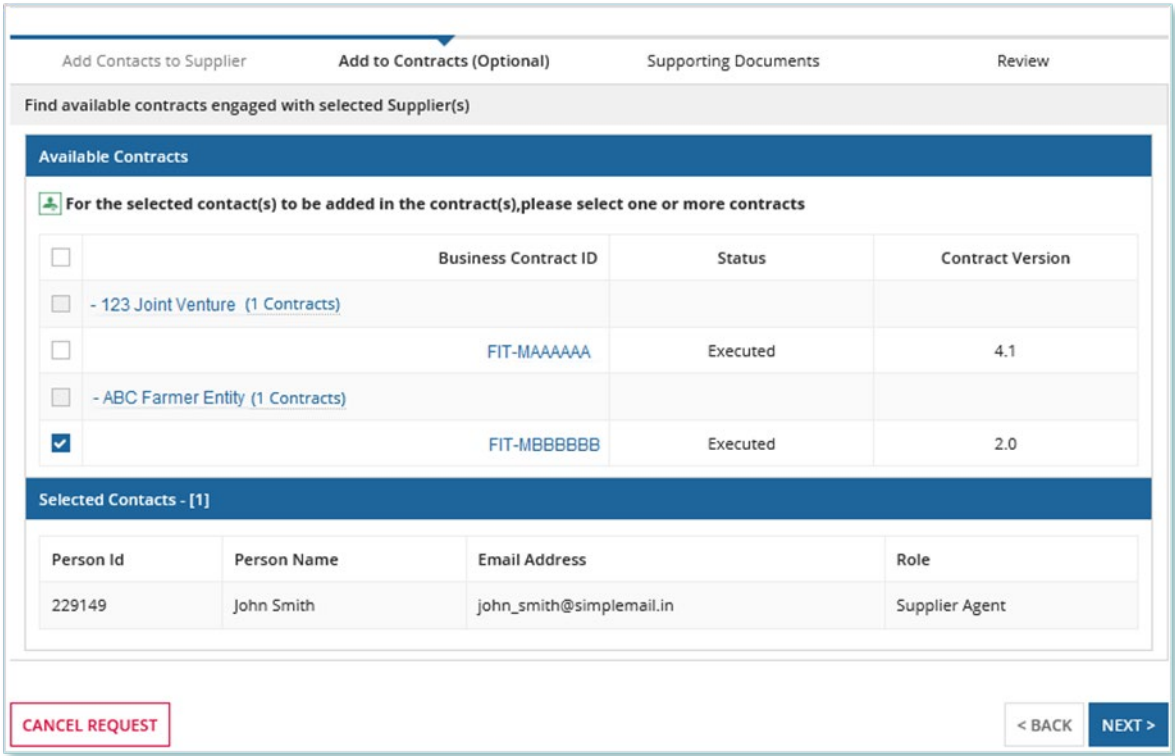


10. Choose a **Role**.



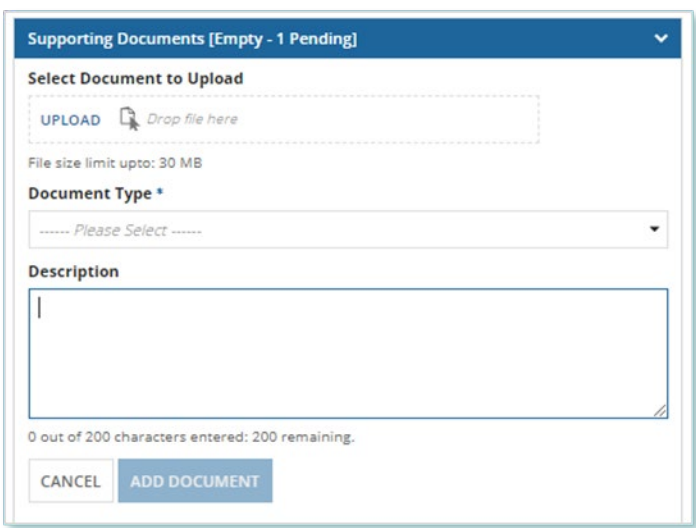
11. You can add more Contacts or select **NEXT**.

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.



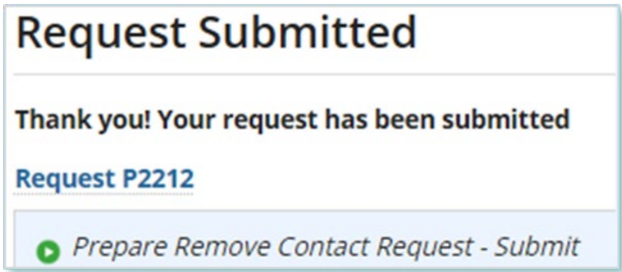
13. Select **NEXT**.

14. **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.



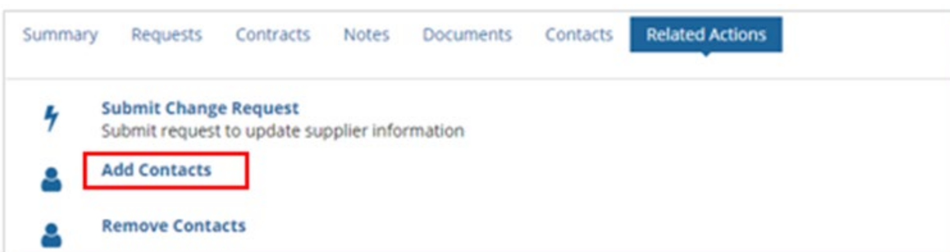
Note: When you add additional Contacts to Suppliers or Contracts, you might be required to submit supporting documentation as evidence of certain information (e.g. prescribed forms, director's register, etc.).

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.



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 from a Supplier by going to a Supplier Record and selecting **Related Actions** > **Add Contacts**.

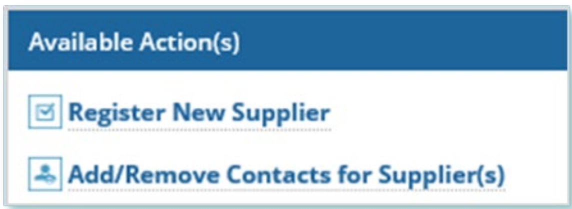


Removing Supplier Contacts from Suppliers

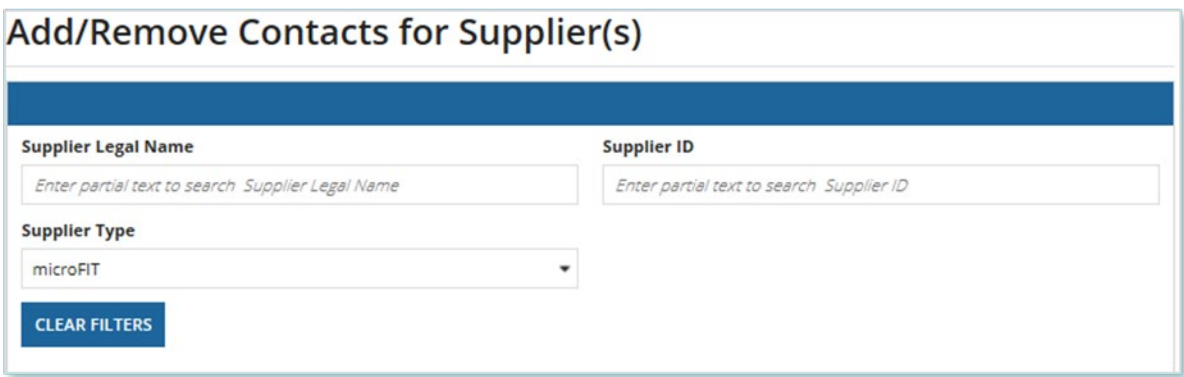
Procedure

1. Select the **MANAGE SUPPLIERS** Suppliers tab.

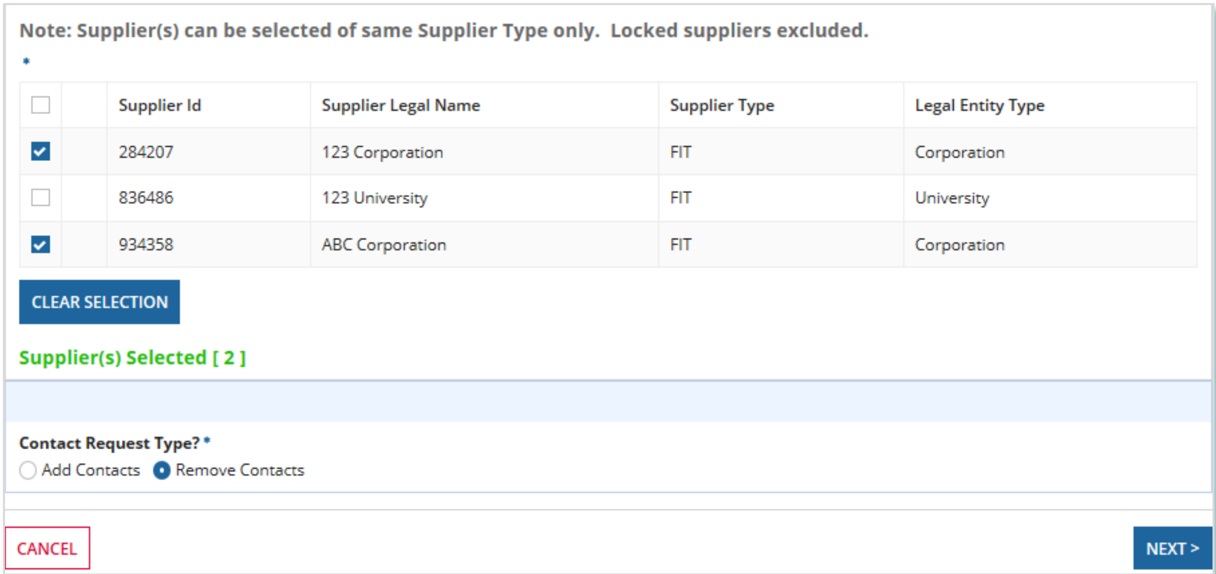
2. Select **Add/Remove Contacts for Supplier(s)**. This brings you to the **Add/Remove Contacts for Supplier(s)** page.



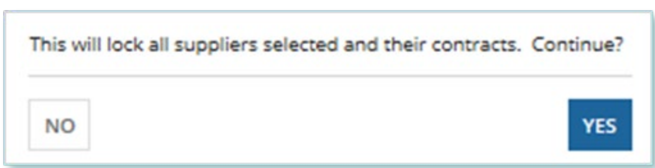
3. **Optional:** Use the filters to search for the Supplier(s) you want to remove.



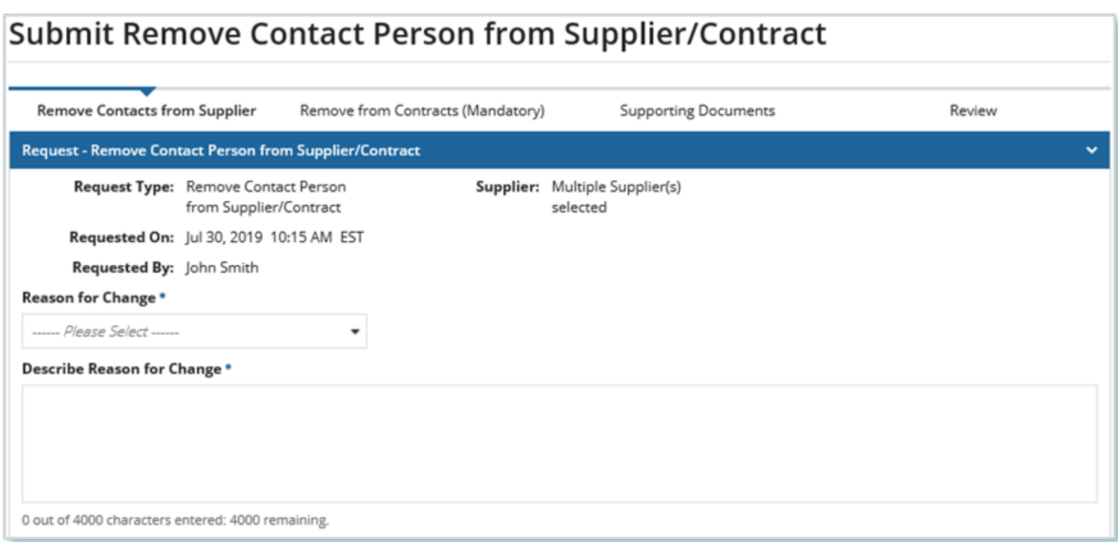
4. Check the box(es) for the Supplier(s) that you want to remove.



5. Select Remove Contacts and then Select **NEXT**.
6. A dialog box is opened, select **Yes**.

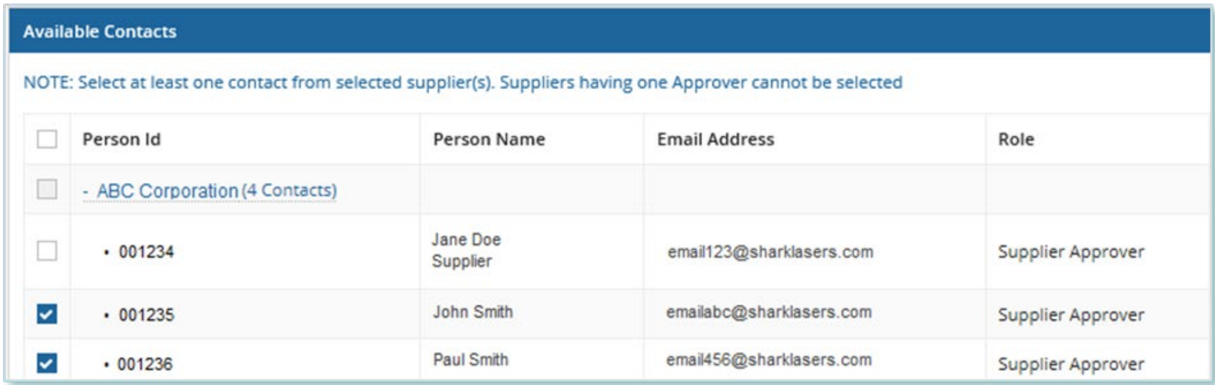


7. On the **Remove Contacts to Supplier** page, choose a reason for submitting the change, and then enter a description for your Request.

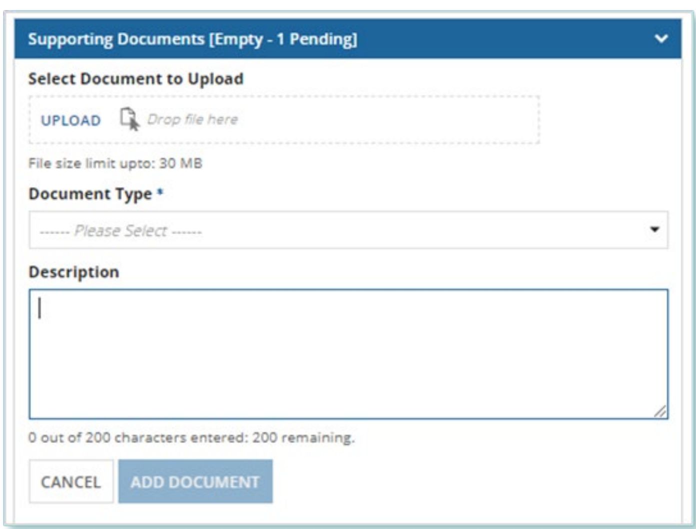


8. Check the box(es) for the Contact(s) that you want to remove from the selected Contract(s), and then select **NEXT**.

Note: You cannot remove all Contacts with the Supplier Approver role. Contracts that have only one Approver cannot be selected.

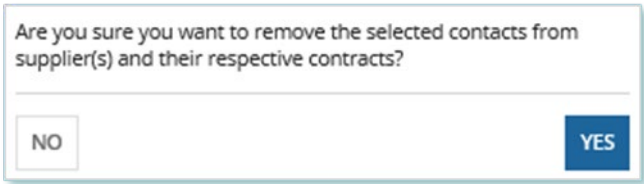


9. On the **Remove from Contracts (Mandatory)** page, review the Contracts associated with the selected Supplier(s). All the selected Contacts will be removed from these Contracts.
10. Select **NEXT**.
11. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

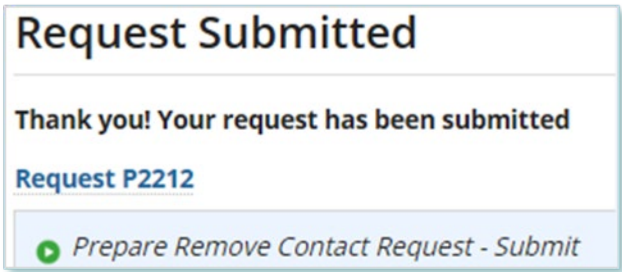


Note: When you remove Contacts from Suppliers or Contracts, you might be required to submit supporting documentation as evidence of certain information (e.g. prescribed forms, director's register, etc.).

12. On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.
13. A dialog box is opened, select **Yes**.

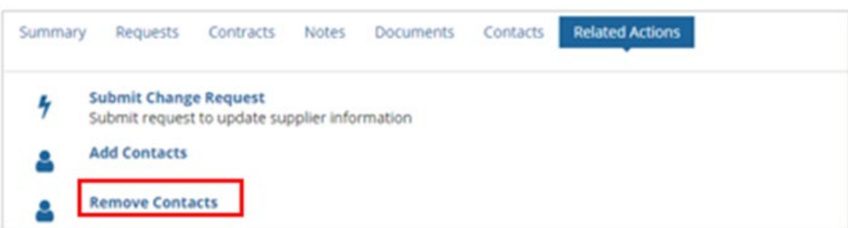


14. Once the Request is submitted, a confirmation page is displayed.



Note: The Request now has a **Request ID** that you can use to track its progress.

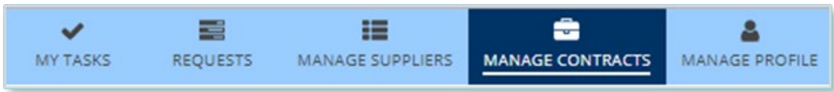
Alternatively, you can initiate a Request to remove Supplier Contacts from a Supplier by going to a Supplier Record and selecting **Related Actions** > **Remove Contacts**



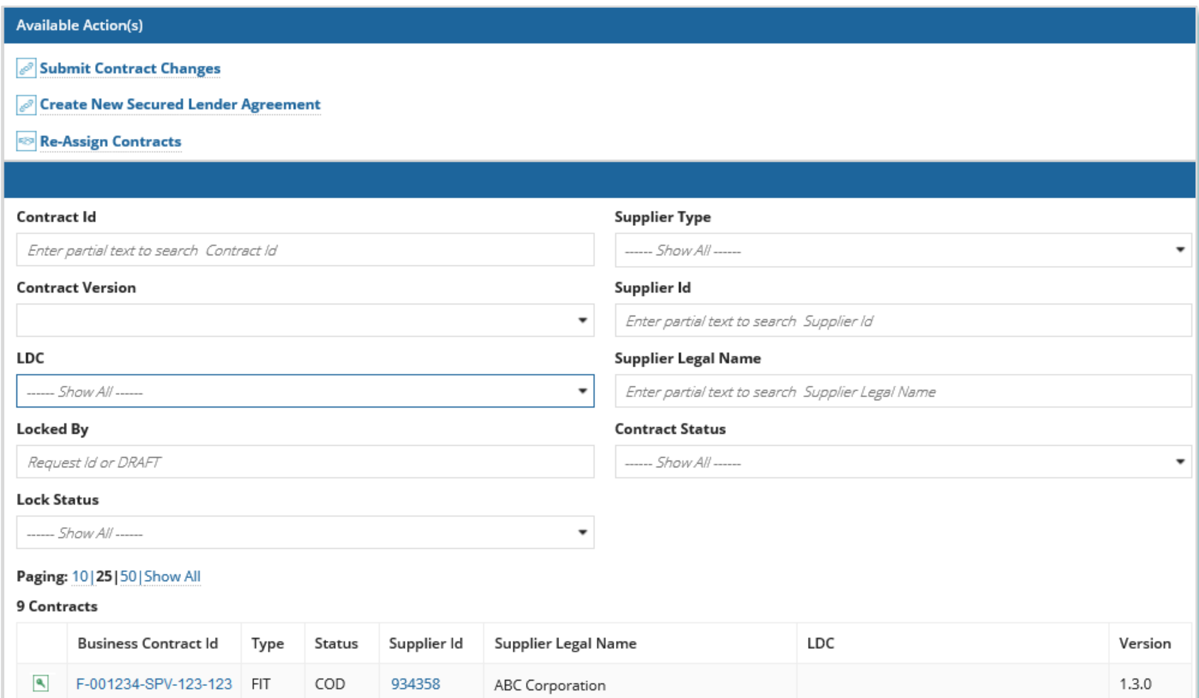
Adding Supplier Contacts to a Contract

Procedure

1. Select the **MANAGE CONTRACTS** tab.

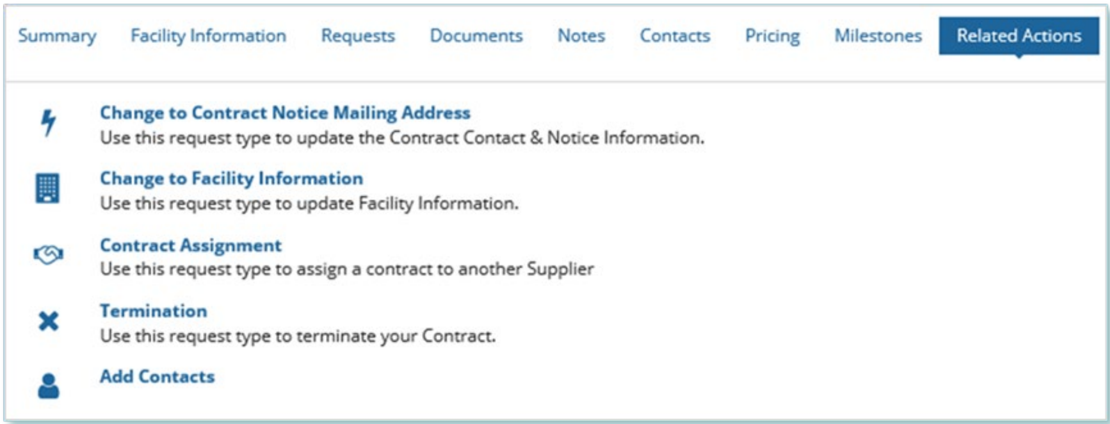


2. **Optional:** Use the filters to search for the Contract that you want to add Contacts to.
3. Select the **Business Contract ID** to view the Contract that you want to add Contacts to.

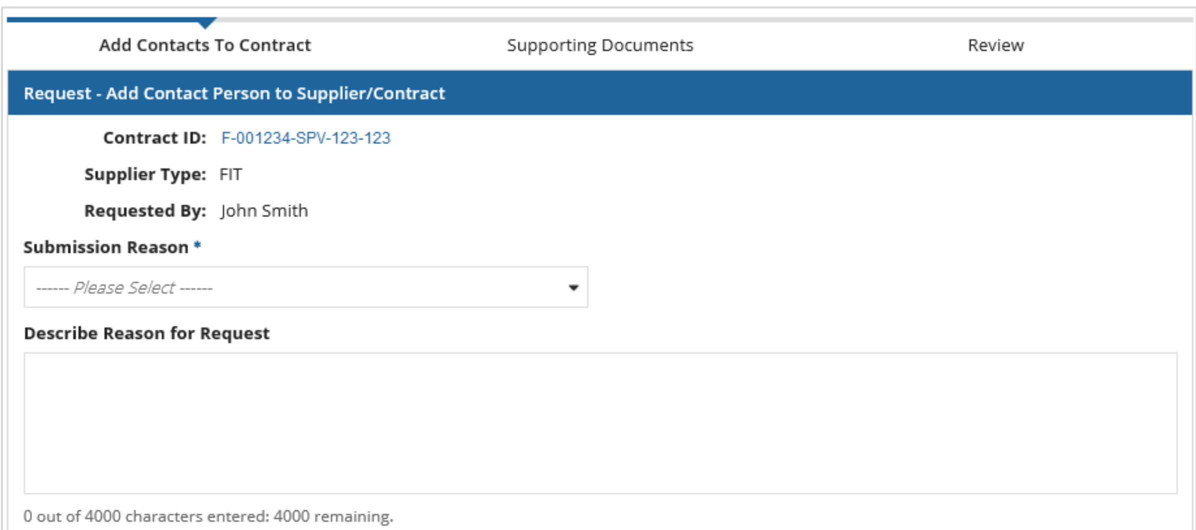


Note: You can add Contacts to a Contract only if they have already been added as a Contact to the Supplier. For instructions on how to Add and/or Remove Contacts from a Supplier, please refer to the Supplier Management user guide document.

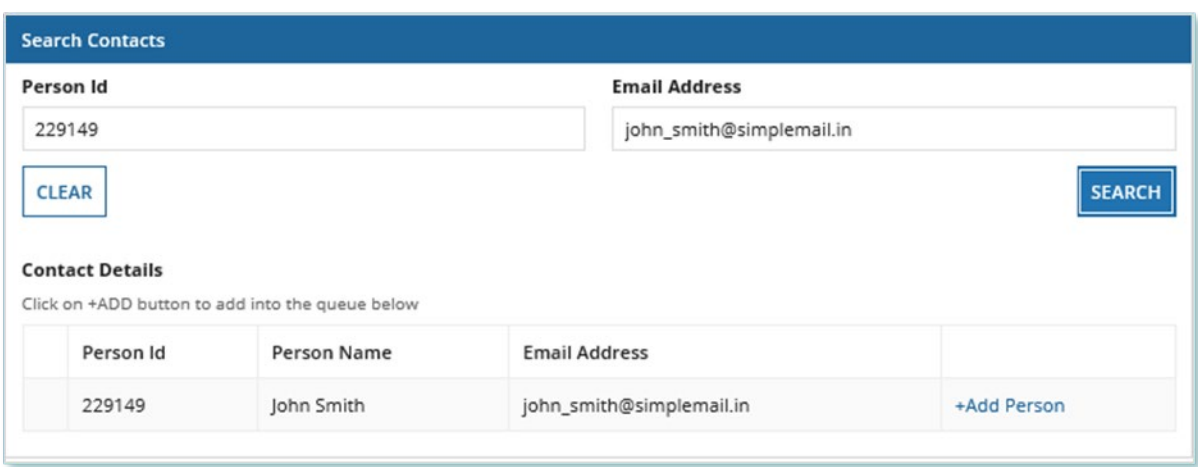
4. Select **Related Actions > Add Contacts**.



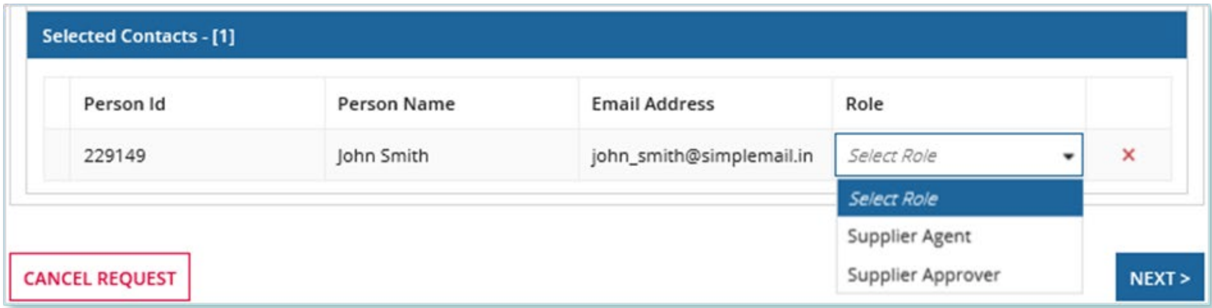
5. On the **Add Contacts to Contract** page, choose a reason for submitting the change, and then enter a description for your Request.



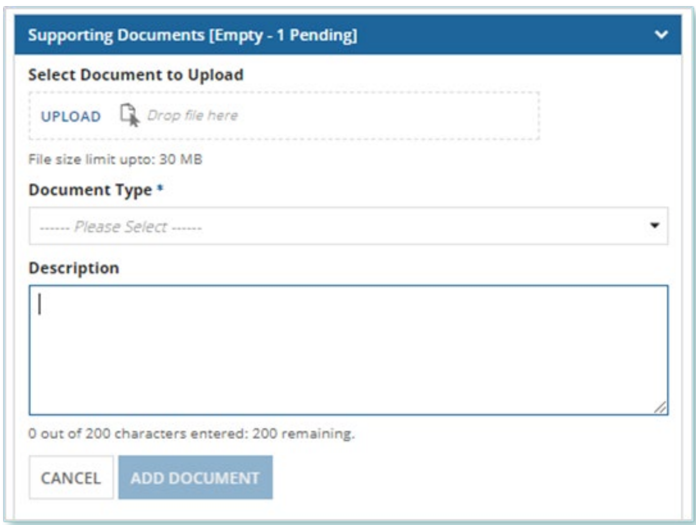
6. Enter the **Person ID** and email address for the Contact that you want to add, and then select **SEARCH**.
7. Select **+Add Person**.



8. Choose a Role.



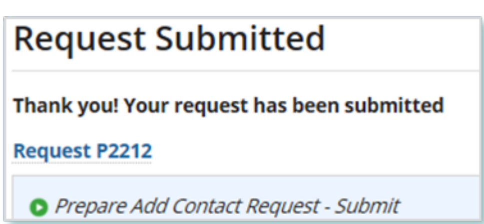
9. You can add more Contacts or select **NEXT**.
10. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



Note: When you add additional Contacts to Contracts, you might be required to submit supporting 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.

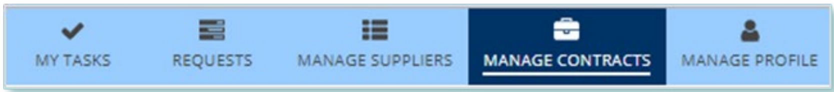
Note: The Request now has a **Request ID** that you can use to track its progress



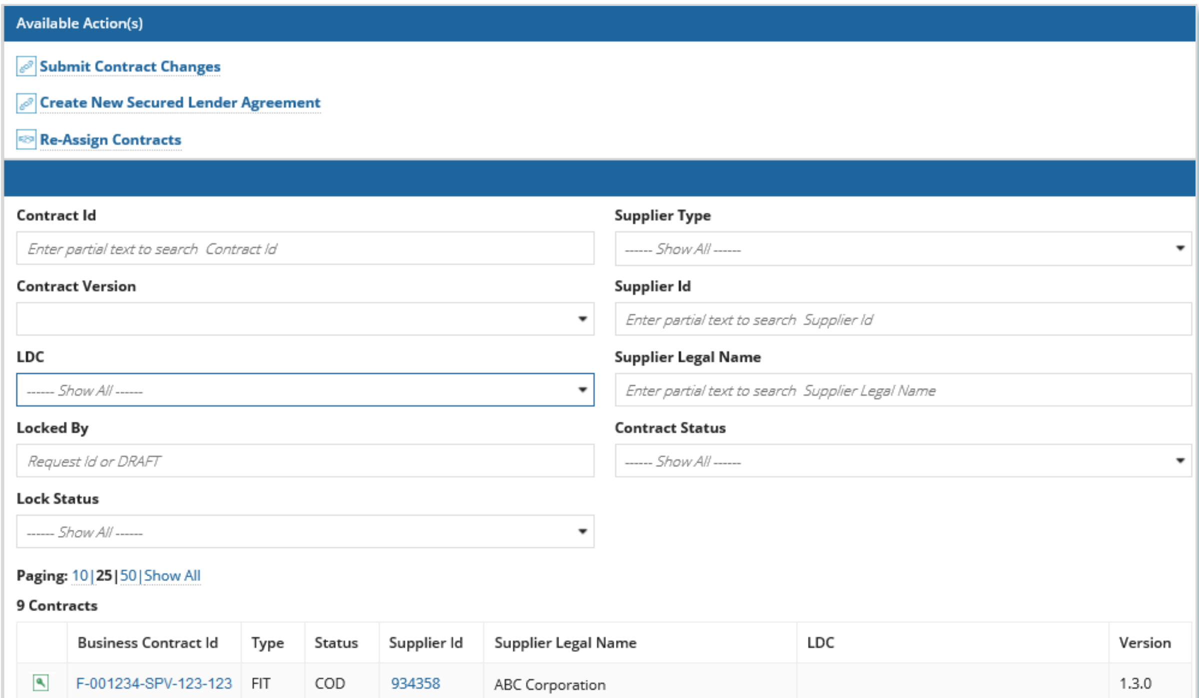
Removing Supplier Contacts from a Contract

Procedure

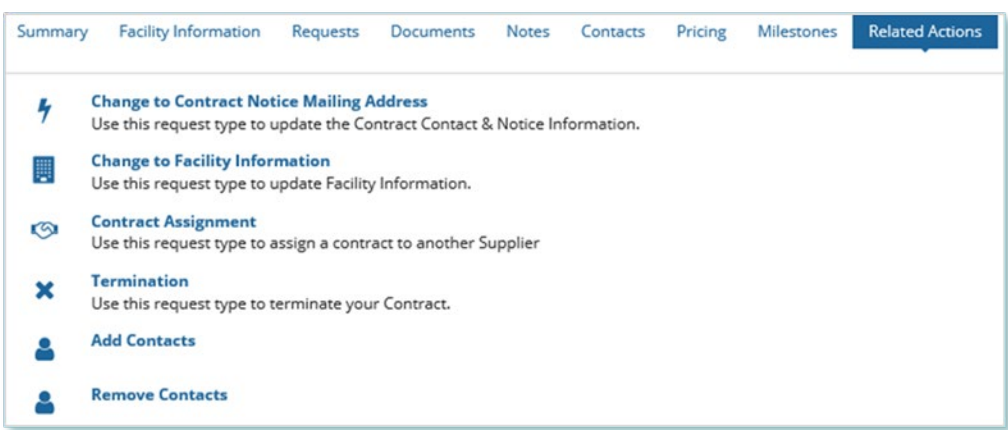
1. Select the **MANAGE CONTRACTS** Suppliers tab.



2. **Optional:** Use the filters to search for the Contract that you want to remove Contacts from.
3. Select the **Business Contract ID** to view the Contract that you want to remove Contacts from.



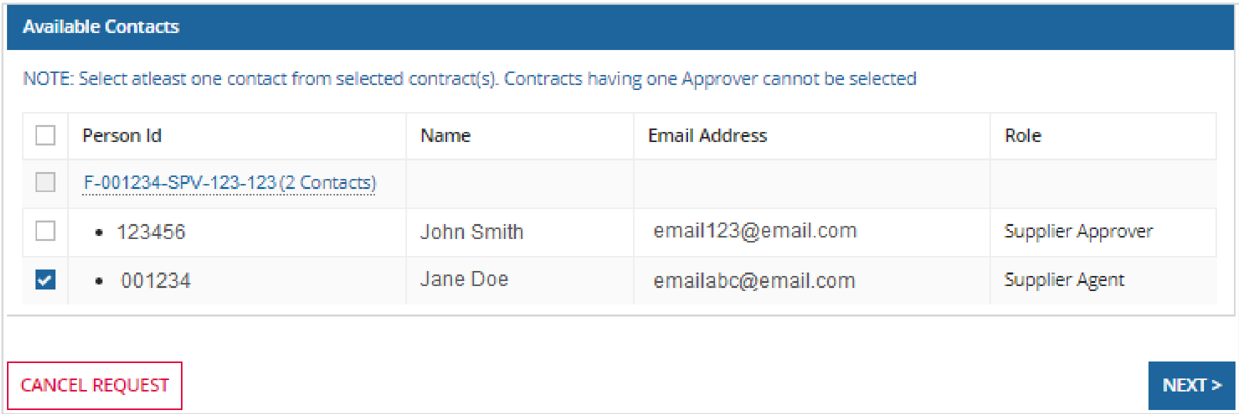
4. Select **Related Actions > Remove Contacts**.



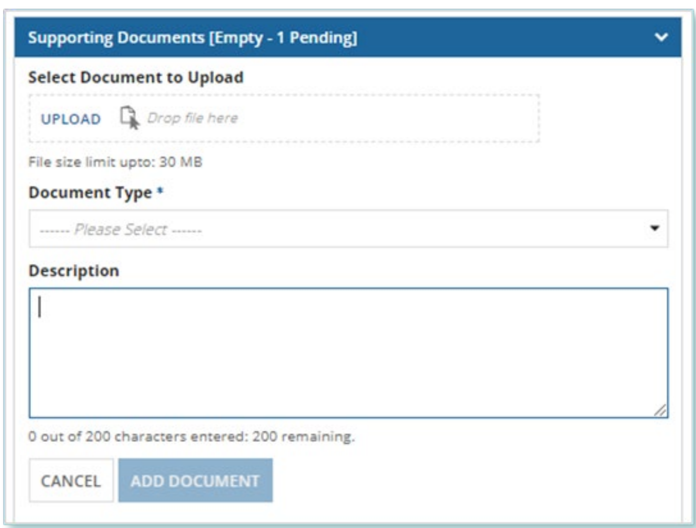
5. On the **Remove Contacts from Contract** page, choose a reason for submitting the change, and then enter a description for your Request.

6. 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.



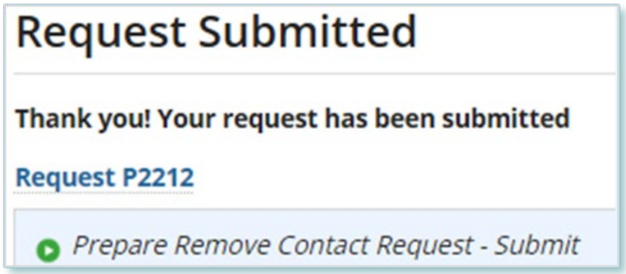
7. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



Note: When you remove additional Contacts to Contracts, you might be required to submit supporting documentation as evidence of certain information (e.g. prescribed forms, director's register, etc.).

8. On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.
9. 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

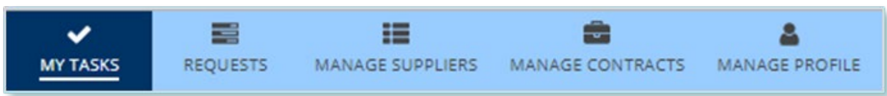
Reviewing Requests Submitted by a Supplier Approver

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.

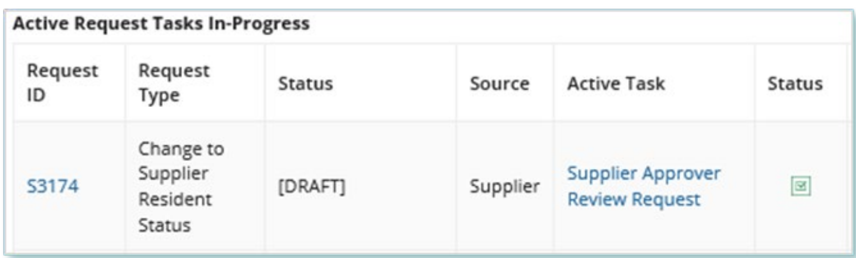
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



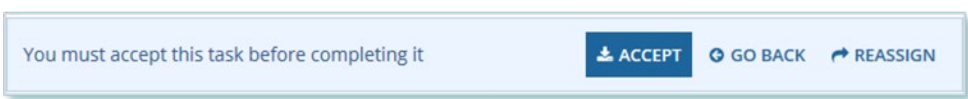
2. Select the **Active Task** for the Request that you want to review. This brings you to the **Review** page.



Active Request Tasks In-Progress

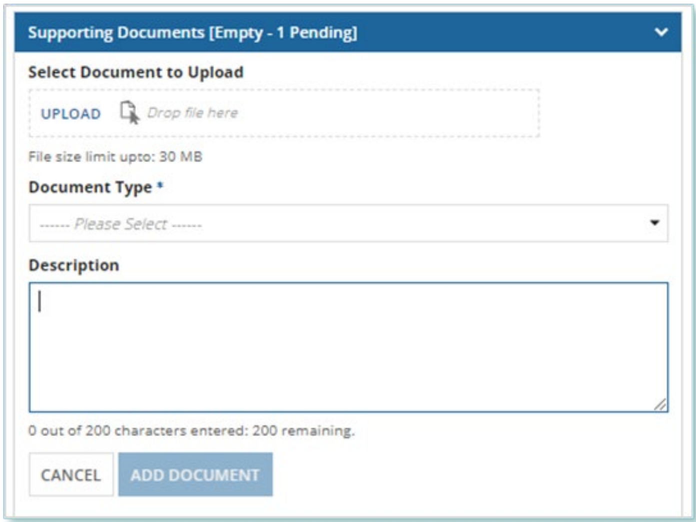
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

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

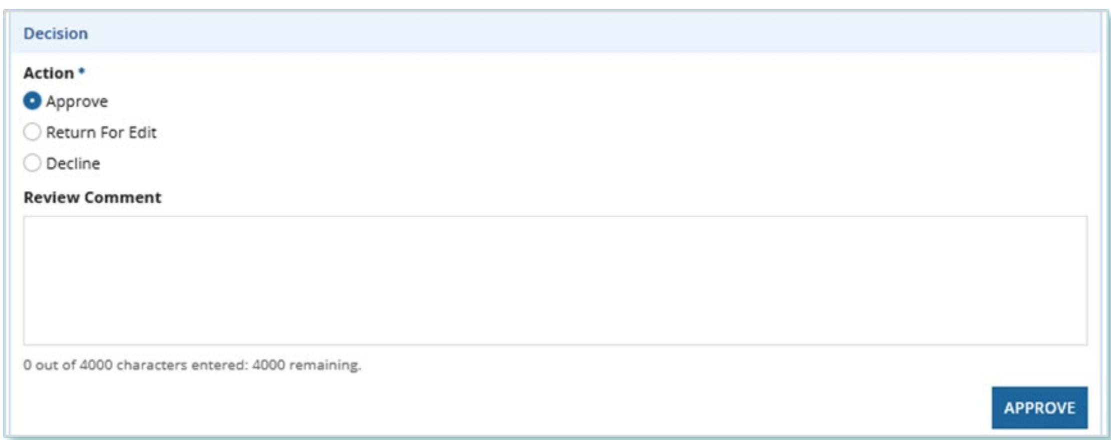


4. Review the values entered and the documents in the Request.

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.

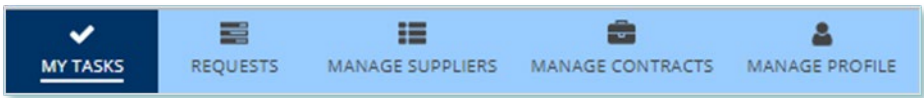
Providing Clarification for Returned Requests

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

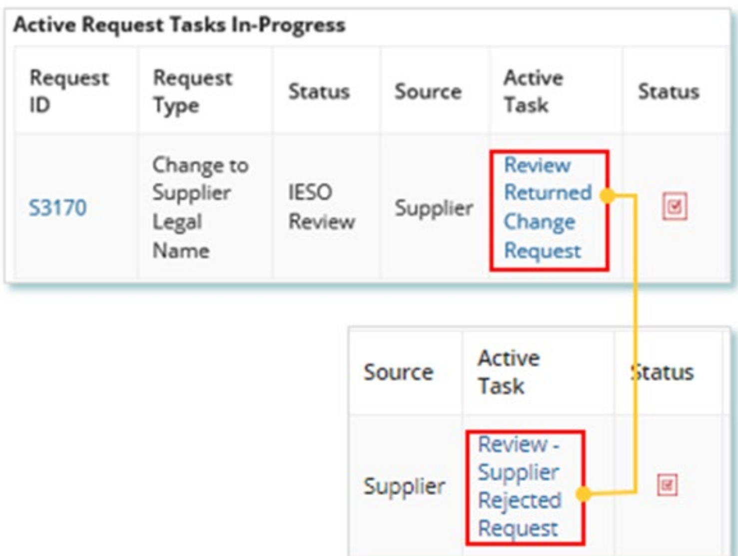
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



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

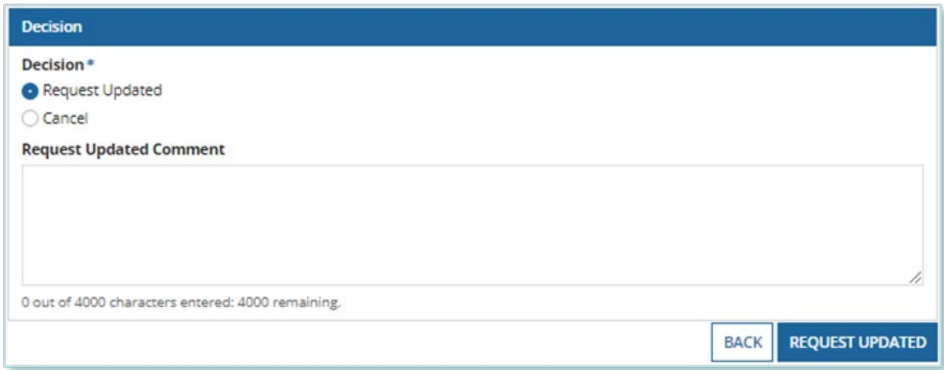


3. On each page, make changes to the fields that require updates.
4. On the **Supporting Documents page**, review any documents added by other users
5. **Optional**: To upload supporting documents, select **+UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then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

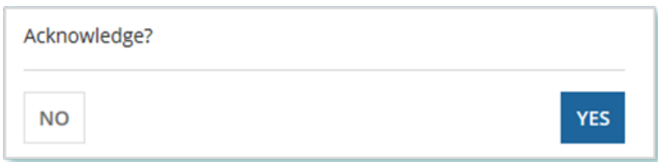
> **Note:** When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

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**.



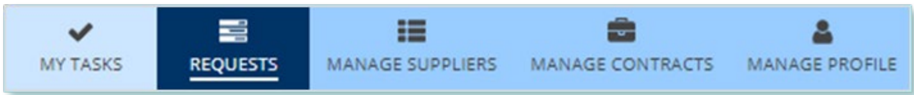
Cancelling a Submitted Request

You can cancel a Request that you submitted.

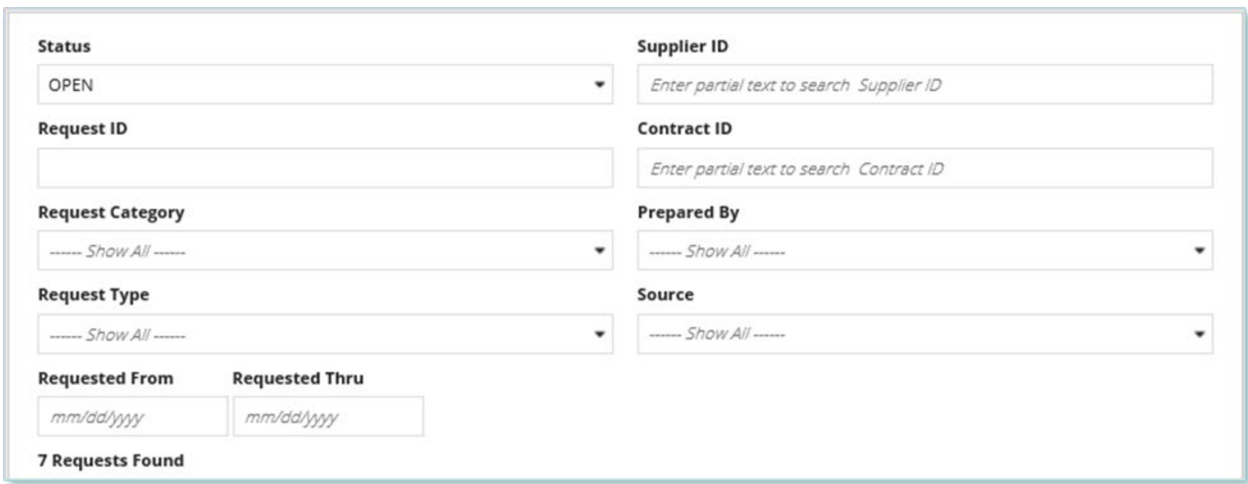
> **Note:** You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

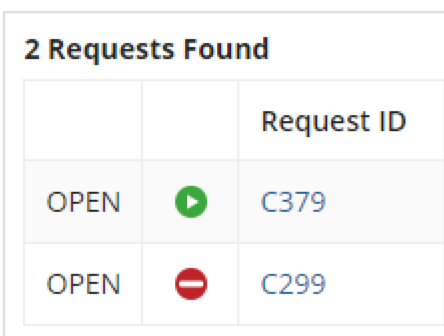
1. Select the **Requests** tab.



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

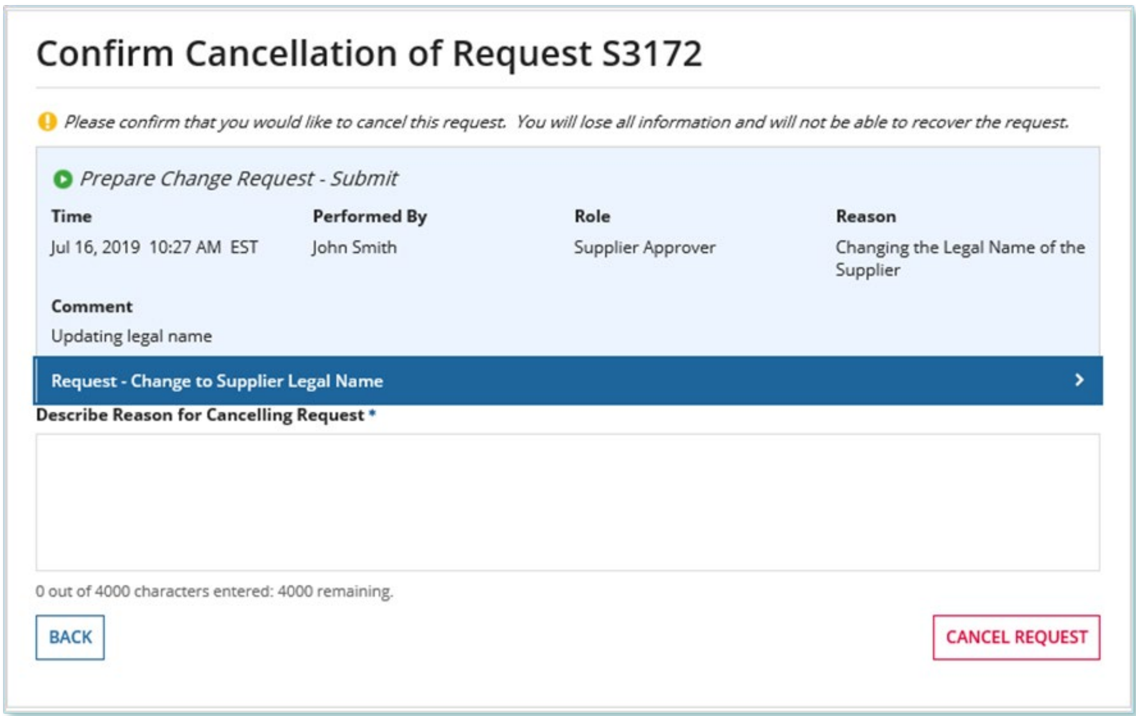


3. Select the **Request ID** to view the Request Record that you want to cancel.

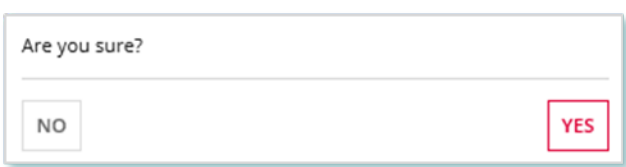


4. Select **CANCEL REQUEST**.

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

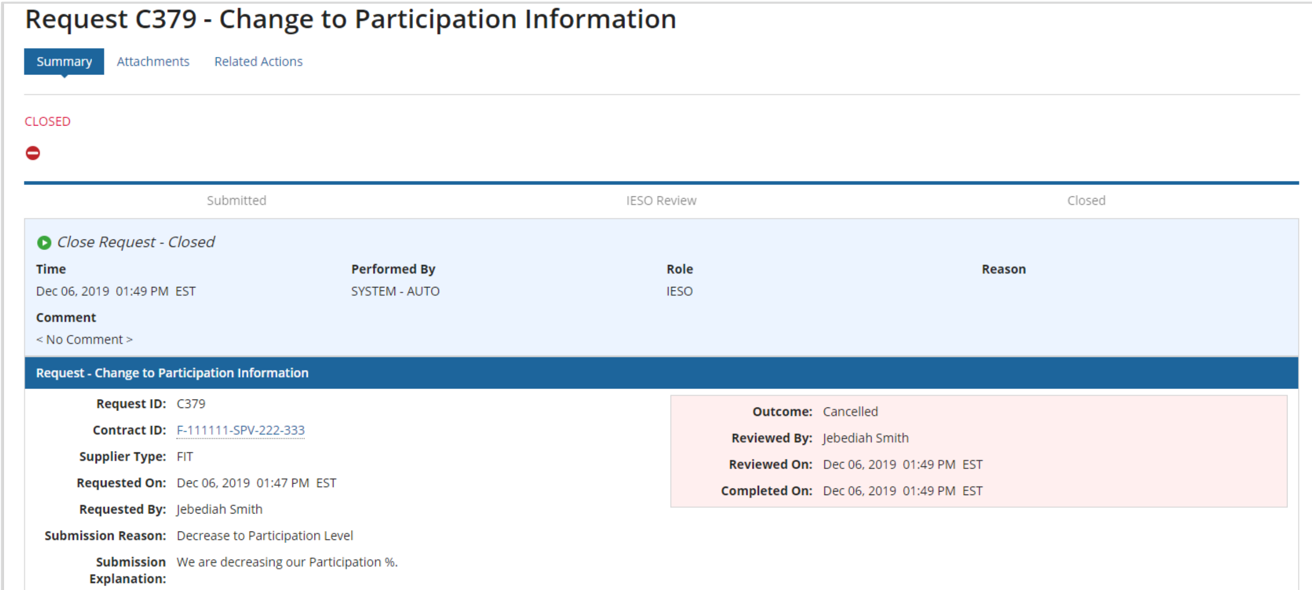


6. Select **CANCEL REQUEST**.
7. A dialog box is opened, select **Yes**.



8. Refresh your page.

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



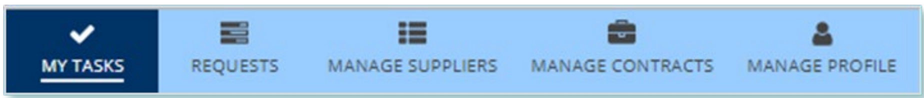
Providing Acknowledgement of a Request Outcome

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

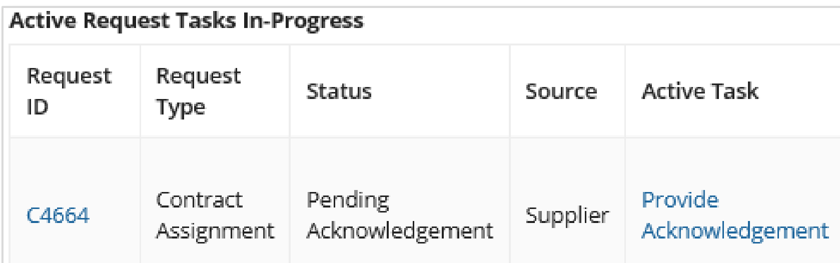
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you under **MY TASKS**.

Procedure

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

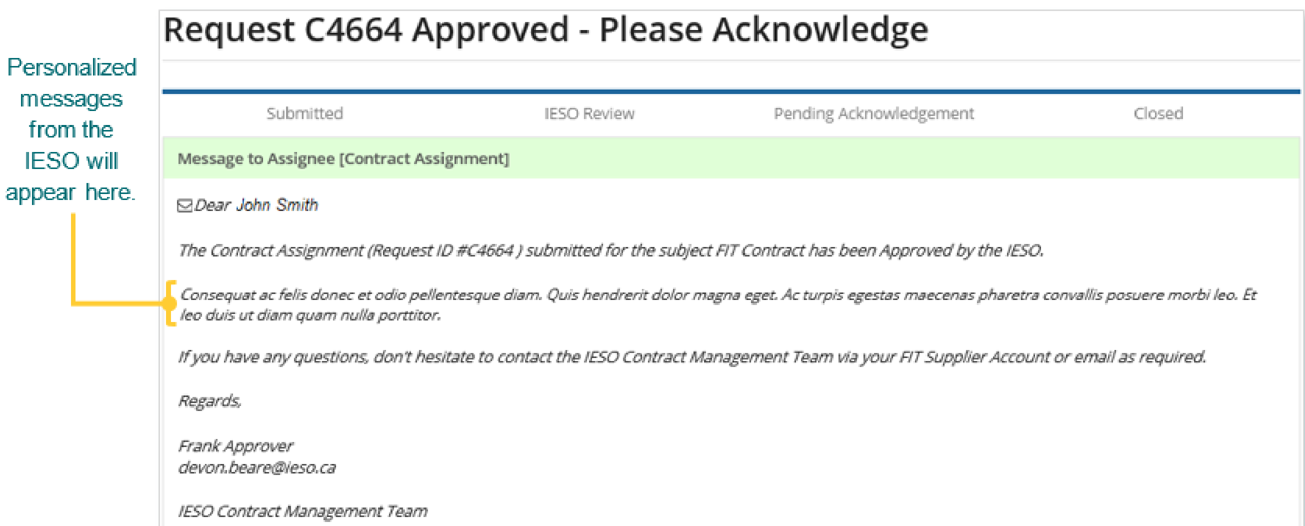


2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.



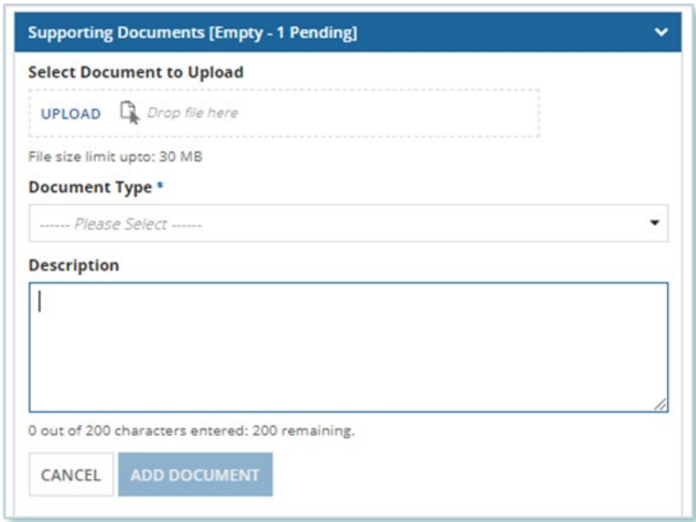
Active Request Tasks In-Progress

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

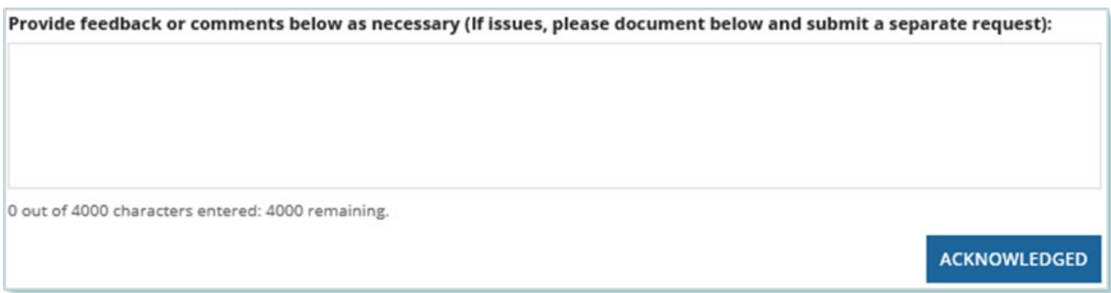


3. Review the information and any documents added by other users.

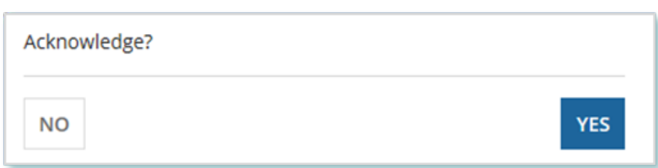
4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



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**.

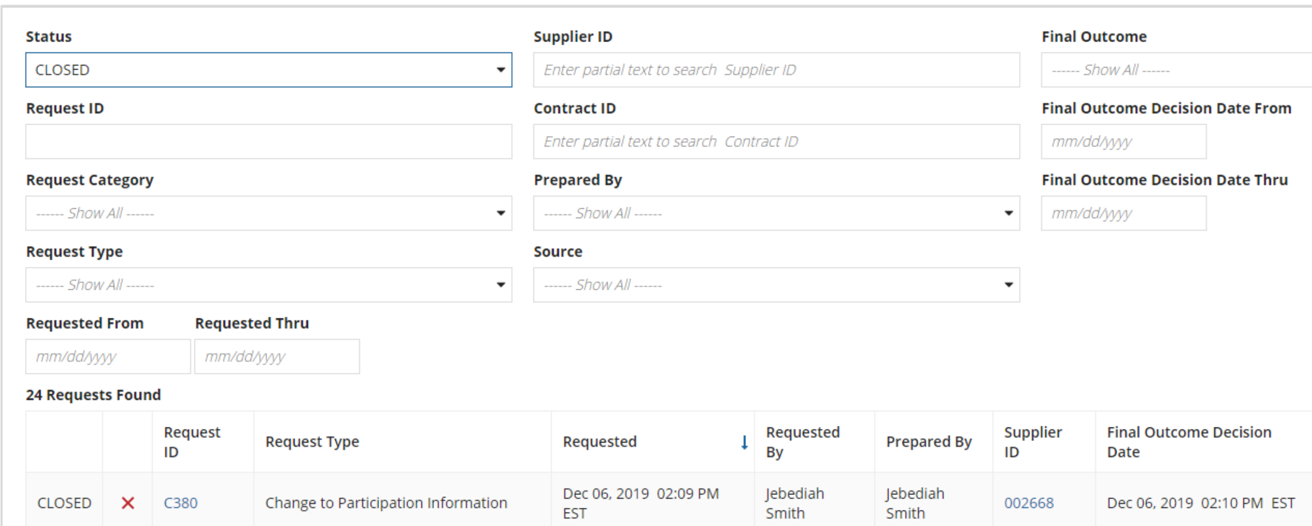


Viewing Request Notifications

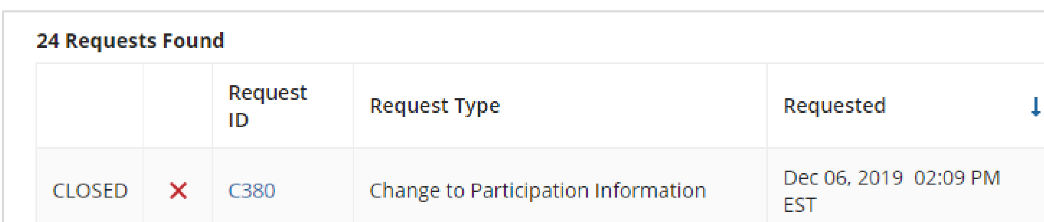
When a decision has been made by the IESO for a Request, you may receive a notification message and/or document that can be found in your Request records.

Procedure

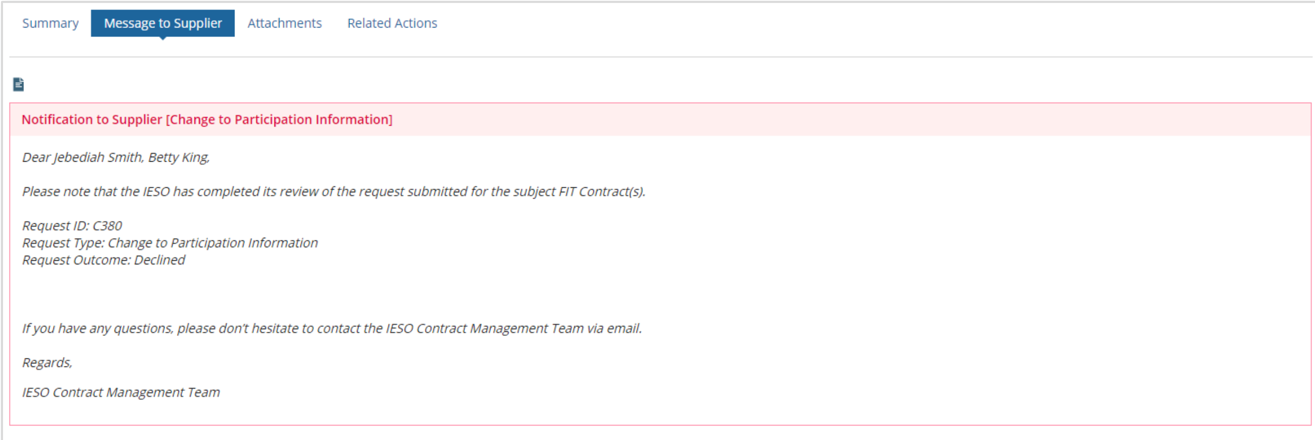
1. Select the **REQUESTS** tab.
2. In the **Request Search** section, change **Status** to **CLOSED**.
3. **Optional:** Use the other filters to search for the Request record you want to view.



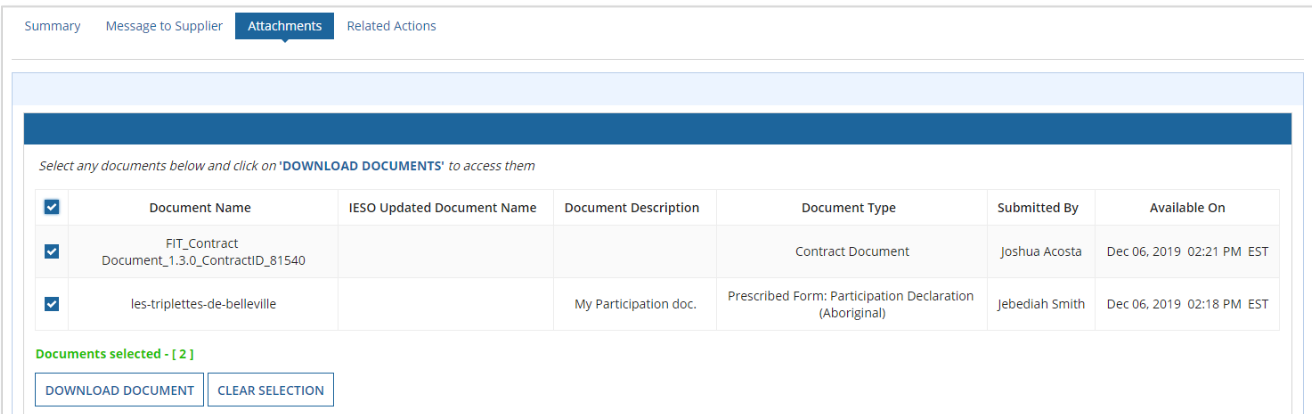
4. Select the **Request ID** to view the Request Record.



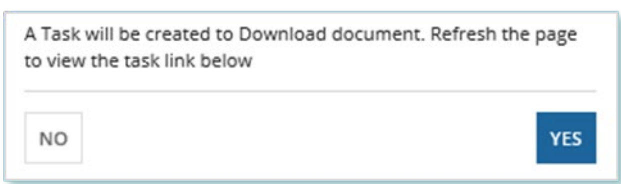
5. To see notification messages from IESO, select the **Message to Supplier** tab.



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

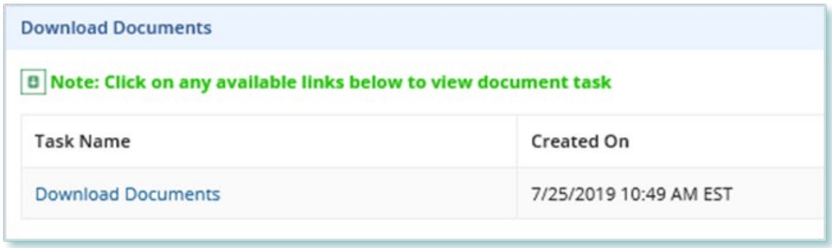


7. Check the box for the notification document, and then select **DOWNLOAD DOCUMENT**.
8. A dialog box is opened, select **Yes**.



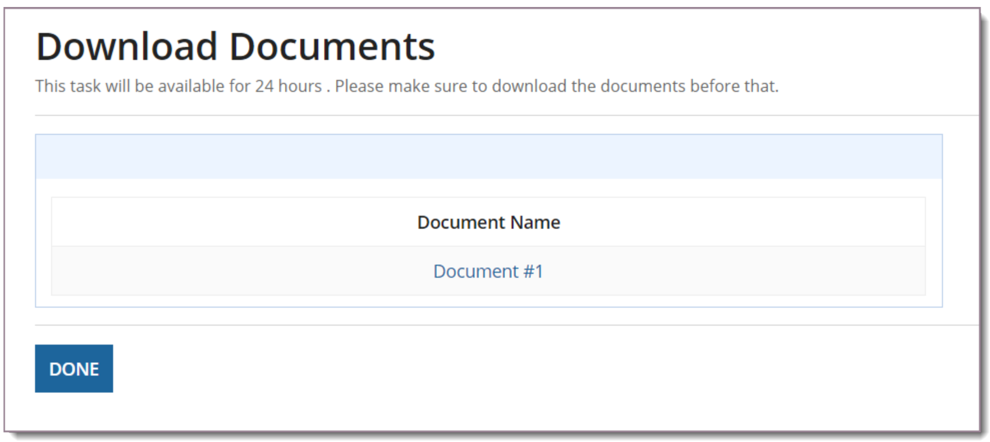
9. Refresh your page.

10. Select **DOWNLOAD DOCUMENTS**.

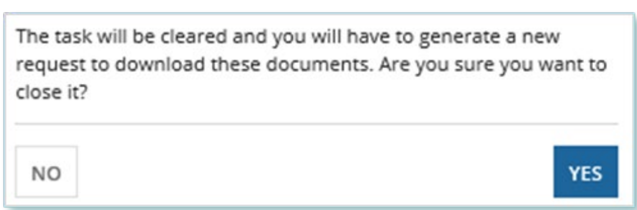


11. Select a document name to begin downloading it.

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



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

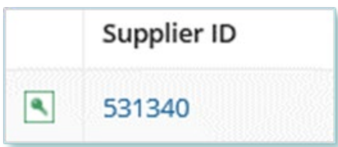


Downloading and Saving Documents

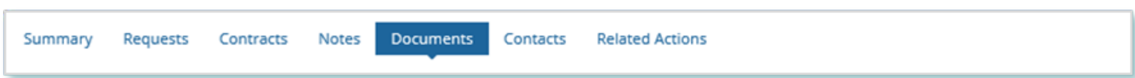
For your records, you can download and save documents related to your Suppliers, your Contracts, your profile account and/or any related Requests submitted.

Procedure

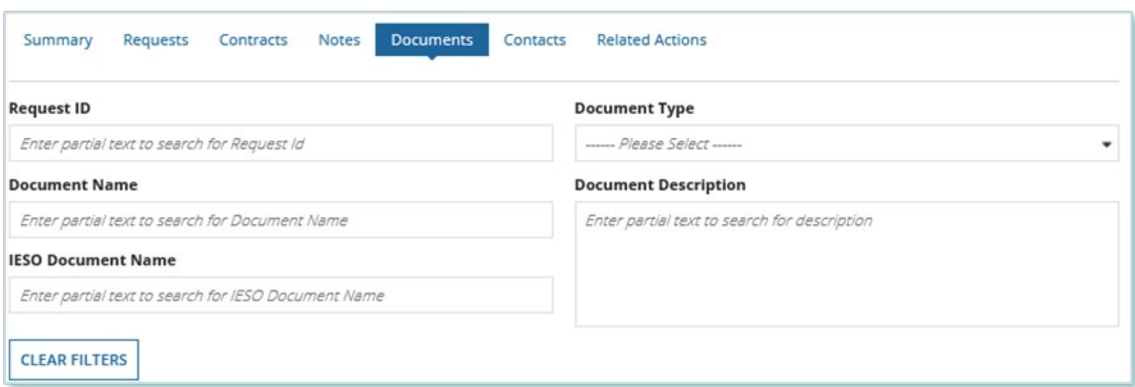
1. Select the tab that contains the Record you want to view.
    a. To download a Supplier document, select the **Manage Suppliers** tab.
    b. To download a Contract document, select the **Manage Contracts** tab.
    c. To download a Person document, select the **Manage Profile** tab.
2. Select the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



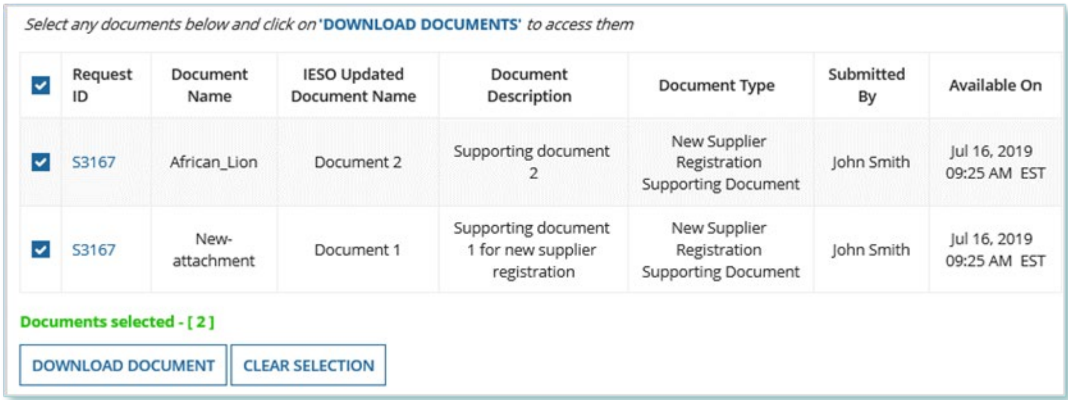
3. Select the **Documents** tab.



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.



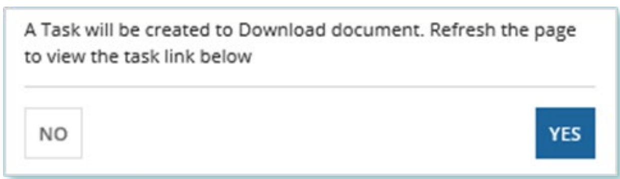
Select any documents below and click on '**DOWNLOAD DOCUMENTS**' *to access them*

	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

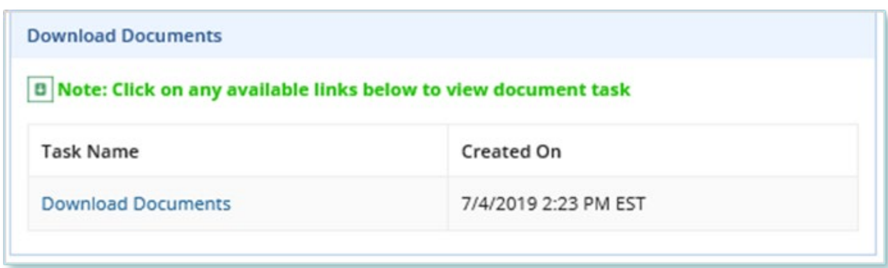
Documents selected - [2]

DOWNLOAD DOCUMENT | CLEAR SELECTION

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



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

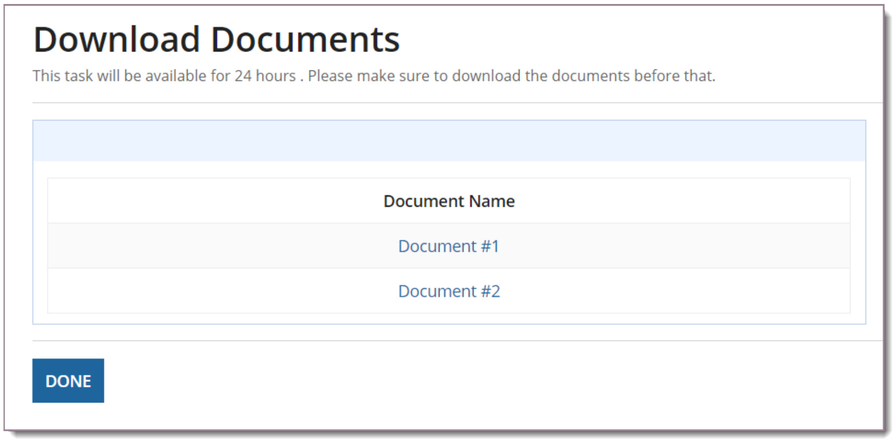


Download Documents

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

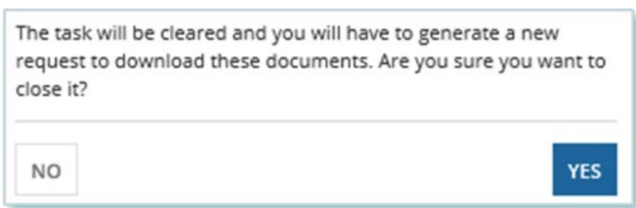
Task Name	Created On
Download Documents	7/4/2019 2:23 PM EST

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



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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1600-120 Adelaide Street West
Toronto, Ontario M5H 1T1

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Powering Tomorrow.