Beacon microFIT Supplier

Digital User Guide
Verification Tasks

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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 microFIT Contracts online. Beacon consolidates all microFIT Contract information into one place and integrates the Contract management functions of the microFIT program, creating a single comprehensive and secure system that allows for accurate and efficient data management.

Beacon is used to view information, manage contractual obligations, and send and receive notifications for existing microFIT Contracts.

microFIT Program Roles

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

Beacon Program Roles

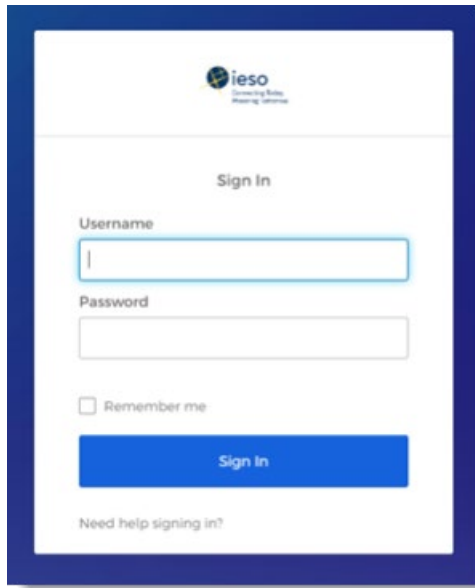| Role	Description
Supplier Approver	The Supplier Approver is the microFIT Contract counterparty or an individual who has the authority to act on the behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to "you" and "your" throughout this user guide are references to a Supplier Approver. **Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.**

Role	Description
Supplier Agent	The Supplier Agent is an optional role assigned by the Supplier Approver in relation to a microFIT Contract. When assigned to a microFIT Contract, a Supplier Agent can view the microFIT Contract and related information 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.**
IESO	The IESO is represented by the Contract Management team that reviews, approves and/or rejects requests submitted by the Supplier Approver to the IESO. The IESO can also initiate certain requests that are to be reviewed by the Supplier Approver.

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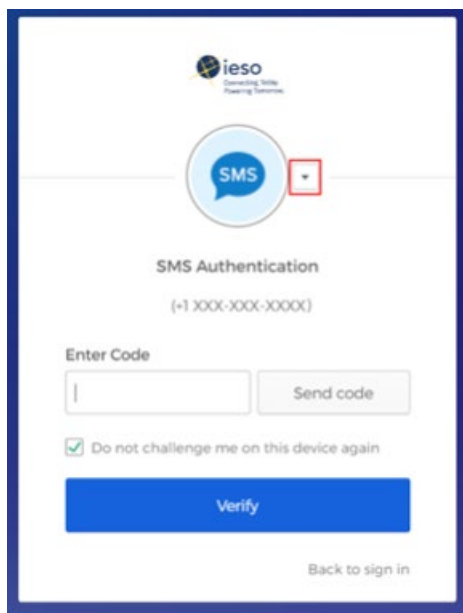
To begin managing your microFIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.

Procedure
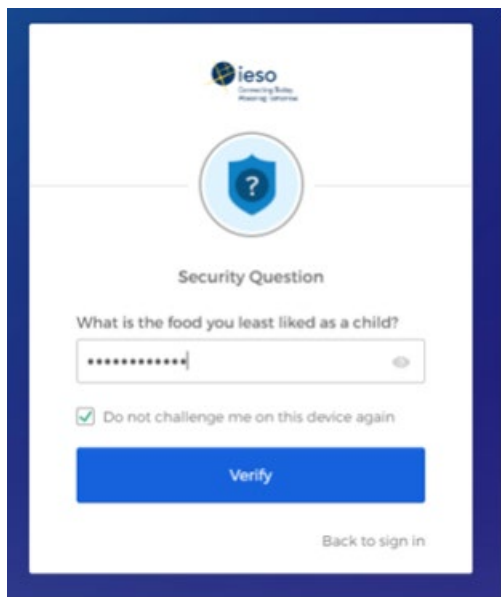
1. Navigate to IESO Gateway - Sign In

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

3. 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.

4. 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**.

5. On your My Apps Dashboard, select the tile that says "Online IESO".
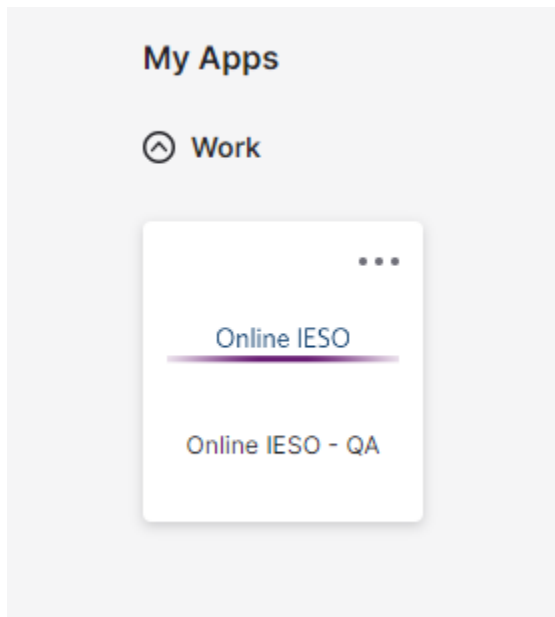
6. Next you will be brought to the Available Programs Dashboard. Select the **FIT-microFIT Program** tile to enter Beacon.

Welcome to the IESO Programs dashboard. Please select the program you wish to participate in below to proceed to the appropriate site.

| FIT-microFIT Program	Industrial Energy Efficiency Program	Retrofit
	SAVE ON **ENERGY** POWER WHAT'S NEXT	**SAVE** ON **ENERGY** POWER WHAT'S NEXT
Click here to enter Beacon	**Register for Industrial Energy Efficiency Program**	**Register for Retrofit**
The Feed-In Tariff (FIT) Program was developed to encourage and promote greater use of renewable energy sources. The microFIT Program supports the development of small or "micro" renewable electricity generation projects (10 kilowatts (kW) or less in size) such as solar panel installations.	The Save on Energy Industrial Energy Efficiency Program (IEEP) is a new program for large industrial consumers in Ontario. It provides financial incentives to implement projects that deliver electricity savings through upgrading of industrial processes. The IEEP is intended to support large, complex, customer-driven solutions that result in verifiable electricity system benefits from implementing proven, commercially available technologies.	The Retrofit program is designed to provide a variety of options for businesses, so you can find the right fit for your operations, regardless of your industry.

Managing Verification Tasks

Completing a Person Verification Task

When accessing Beacon for the first time, you will be asked to verify your personal contact information contained on the Person record. This will be initiated through a Person Verification task that will appear on your **MY TASKS** page. The purpose of this task is to verify that the information that the IESO has on record is correct and, if there has been a change to your personal contact information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Person Verification task in Beacon.

Procedure

1. Select the **My Tasks** tab.
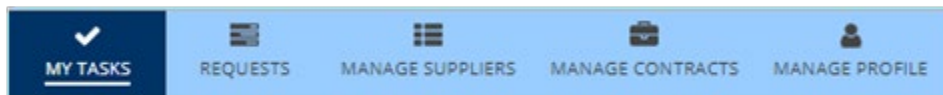
2. Select **Complete Person Verification** for the Request that you want to work on.
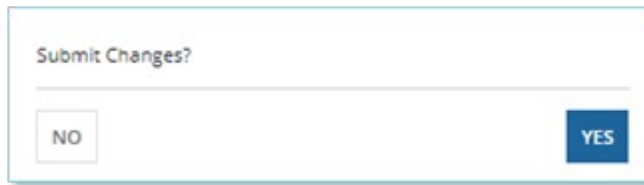
Active Request Tasks In-Progress				
Request ID	Request Type	Status	Source	Active Task
P1965	Verify Information	Submitted	IESO	Complete Person Verification

3. Once the task is selected, you will be forwaded to the Enter Changes page. If your contact information has changed then update your contact information, and then select **Next**.

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.

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

Note: If there have been any material changes to your personal contact information (e.g. a name change), you might be required to submit certain documentation as evidence of the change.

5. Once you've uploaded your documents (if applicable) select next and you will be forwarded to the **Review** Page. On the Review page, look over all your changes and ensure the information is accurate before submitting.

6. **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the **Submission Comment** field.

Submission Comment

< BACK   SUBMIT CHANGES

7. Select **Submit Changes**. If you did not make any changes, select **Verify No Changes**.

8. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.

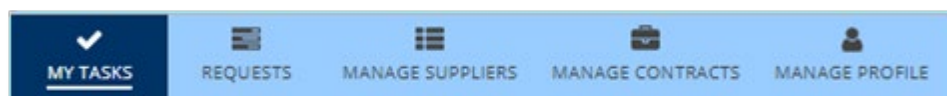Submit Changes?

NO   YES

Completing a Supplier Verification Task

After your Person Verification task has been submitted and approved by the IESO, you will be asked to verify the information related to your Supplier(s). This will be initiated through a Supplier Verification task that will appear on your **MY TASKS** page. The purpose of this task is to verify that the information that IESO has on record for your Supplier(s) is correct and, if there has been a change to your Supplier(s) information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Supplier Verification task in Beacon.

Procedure

1. Select the **My Tasks** tab.

2. Select **Complete Supplier Verification** for the Request that you want to work on. This brings you to the **Enter Changes** page.

Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task
S3047	Verify Information	Submitted	IESO	Complete Supplier Verification

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

You must accept this task before completing it   ± ACCEPT   ○ GO BACK   ↱ REASSIGN
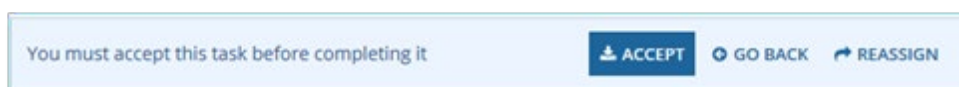
4. If your Supplier information has changed, you may be able to update your Supplier information directly on the Request. However, if the Supplier information fields are greyed out, you will NOT be able to make any changes.

5. **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the Submission Comment field.

6. Select **Next** and you will be forwarded to the **Review** Page. On the Review page, look over all your changes and ensure the information is accurate before submitting.

7. Select **Submit Changes**. If you did not make any changes, select **Verify No Changes**.

8. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.
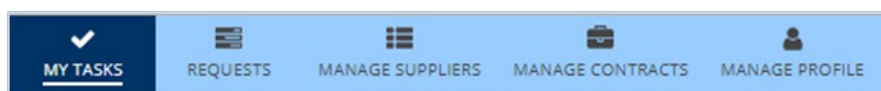
Completing a Contract Verification Task

After your Supplier Verification task has been submitted and approved by the IESO, you will be asked to verify the information related to your Contract(s). This will be initiated through a Contract Verification task that will appear on your **My Tasks** page. The purpose of this task is to verify that the information that IESO has on record for your Contract(s) is correct and, if there has been a change to your Contract(s) information, allow you to submit any changes for IESO review. The following instructions will guide you through how to complete this Contract Verification task in Beacon.

Procedure
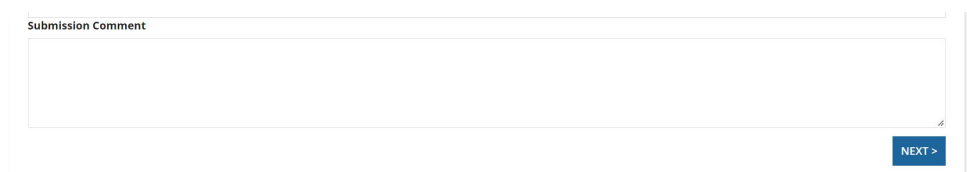
1. Select the **My Tasks** tab.

2. Select **Complete Contract Verification** for the Request that you want to work on. This brings you to the **Enter Changes** page.

Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task
C4260	Verify Information	Submitted	IESO	Complete Contract Verification

3. To begin working on the task, select the **ACCEPT** icon.
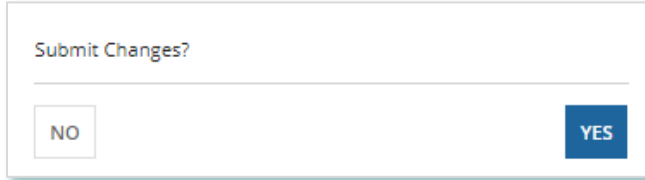
You must accept this task before completing it   ± ACCEPT   ⟳ GO BACK   ↱ REASSIGN
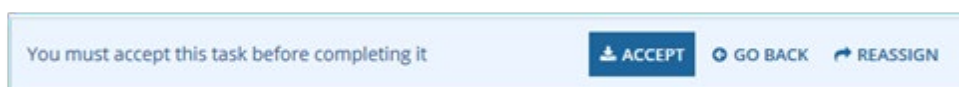
4. If your Contract information has changed, you may be able to update your Contract Information directly on the Request. However, if the Contract information fields are greyed out, you will NOT be able to make any changes.

5. **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the Submission Comment field.

Submission Comment

[   ]

NEXT >

6. Select **NEXT** and you will be forwarded to the **Review** Page. On the Review page, look over all your changes and ensure the information is accurate before submitting.

7. Select **Submit Changes**. If you did not make any changes, select **Verify No Changes**.

8. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.

Submit Changes?

| NO | YES |

Verification Request Tasks

Reviewing Requests Submitted by a Supplier Approver

If you are a Supplier Approver for a Supplier, you may receive a Supplier Approver Review Request task to review any Requests submitted by other Supplier Approvers of those Suppliers.

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.

✔ MY TASKS	☰ REQUESTS	☷ MANAGE SUPPLIERS	💼 MANAGE CONTRACTS	👤 MANAGE PROFILE
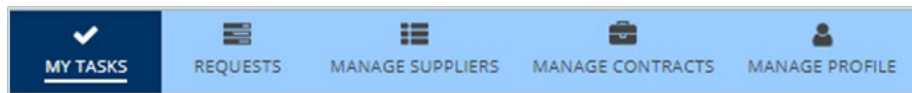
2. Select the Active Task for the Request that you want to review. This brings you to the **Review** page.
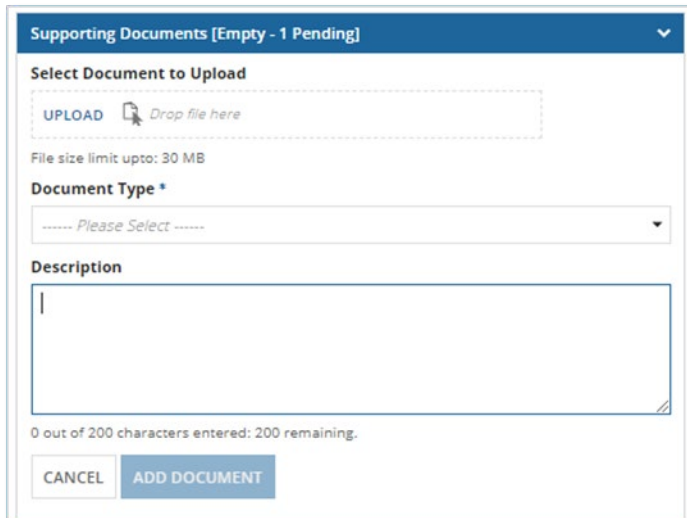
Active Request Tasks In-Progress

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**.

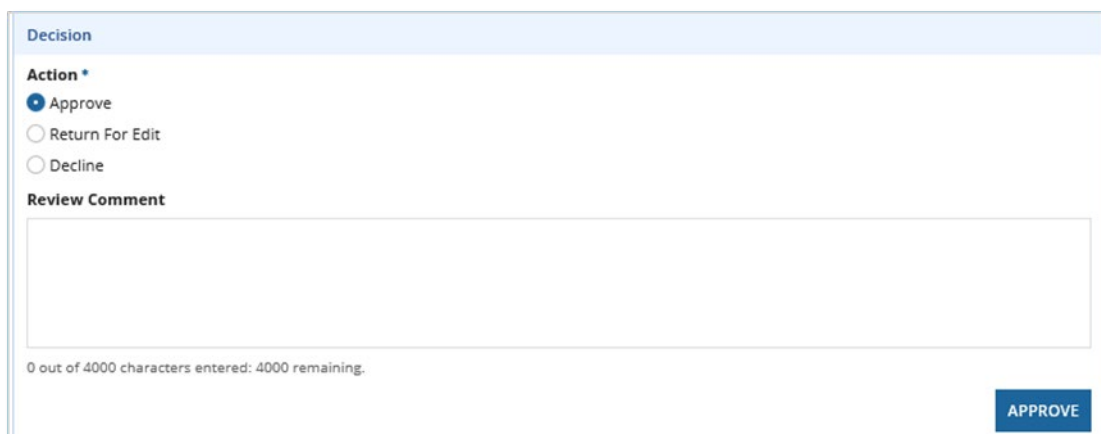You must accept this task before completing it   ⬇ ACCEPT   ⟲ GO BACK   ↗ REASSIGN
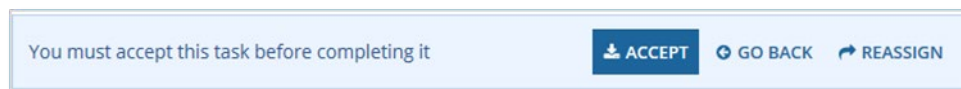
4. Review the values entered and the documents in the Request.

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. Once you've uploaded your documents (if applicable) select next and you will be forwarded to the Review Page. Under Decision, choose either Approve, Return for Edit, or Decline.

   a. If you select Approve, you can enter an explanatory note or comment to provide additional context to the review task, and then select **APPROVE**.

   b. If you select Return for Edit, you can enter an explanatory note or comment to provide additional context to what needs clarification, and then select **RETURN FOR EDIT**.

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

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.
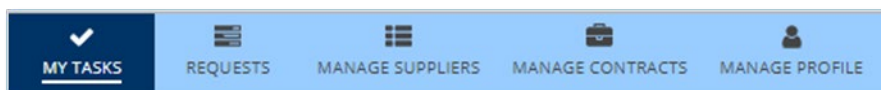
Providing Clarification for Returned Requests

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

Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task	Status
S3170	Change to Supplier Legal Name	IESO Review	Supplier	Review Returned Change Request	☑

3. On the Supporting Documents page, review 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.

Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD *Drop file here*

File size limit upto: 30 MB

Document Type *

------ Please Select ------
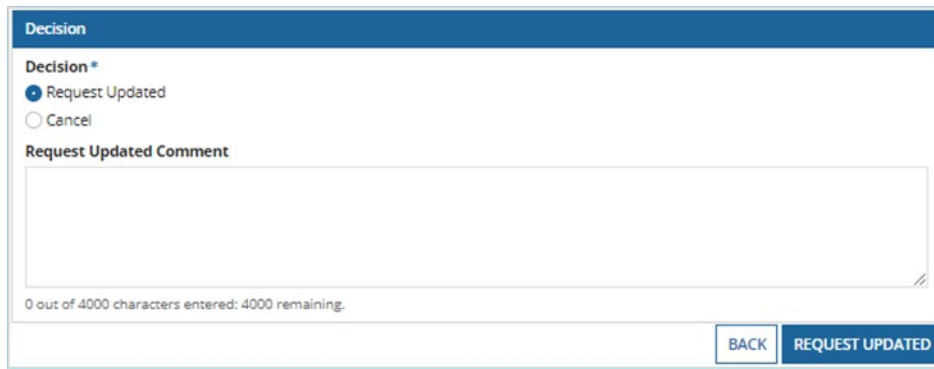
Description

|

0 out of 200 characters entered: 200 remaining.

CANCEL   ADD DOCUMENT

> **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.

5. Review the changes summarized on the Review page.

6. 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**.

7. A dialog box is opened, select Yes.

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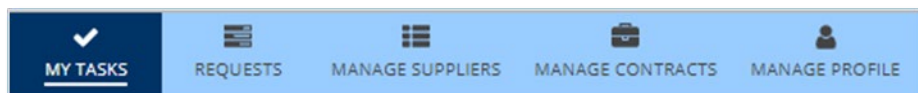
2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.

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

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

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

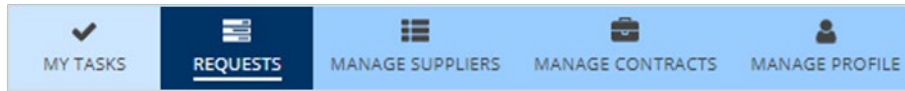6. Select ACKNOWLEDGED.

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.
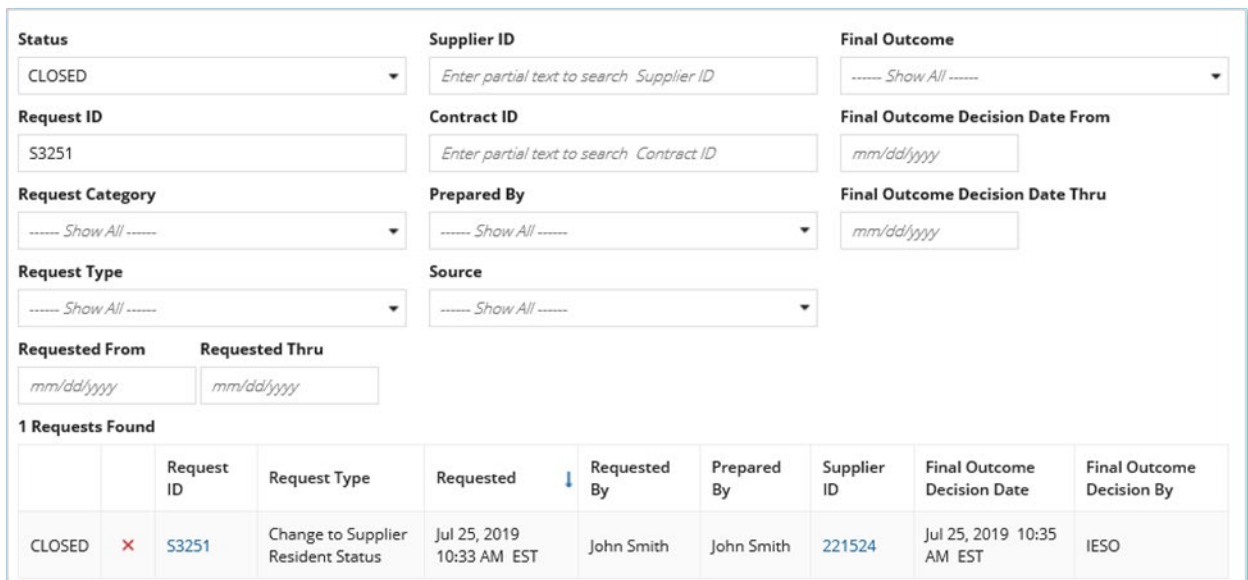
Procedure

1. Select the **REQUESTS** tab.

MY TASKS	REQUESTS	MANAGE SUPPLIERS	MANAGE CONTRACTS	MANAGE PROFILE
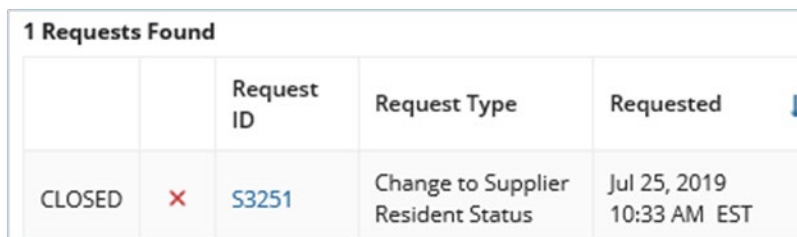
2. Select the Request Search section, change Status to **CLOSED**.

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

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.

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.

Notification to Supplier [Change to Supplier Resident Status]

Dear John Smith,

The Change to Supplier Resident Status (Request ID #S3251) submitted for the subject microFIT Contract has been Declined by the IESO.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Turpis massa sed elementum tempus egestas sed sed. Sed sed risus pretium quam vulputate dignissim suspendisse in. Quis imperdiet massa tincidunt nunc pulvinar sapien et ligula ullamcorper.

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

Regards,

microFIT.contract@ieso.ca

IESO Contract Management Team

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.

Download Documents

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

Document Name
CM -microFIT - 221524 - Change to Supplier - Supplier Notificati- IESO Deploy - 20190725103623 - SUPPLIER NOTIFICATI-221524

DONE

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

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.

Supplier ID
🔍 531340

3. Select the **Documents** tab.

Summary	Requests	Contracts	Notes	Documents	Contacts	Related Actions

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

Summary	Requests	Contracts	Notes	Documents	Contacts	Related Actions

Request ID

Enter partial text to search for Request Id

Document Type

------ Please Select ------

Document Name

Enter partial text to search for Document Name

Document Description

Enter partial text to search for description

IESO Document Name

Enter partial text to search for IESO Document Name

CLEAR FILTERS

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
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043717 - Document 2
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043731 - Document 1

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:

microFIT Homepage: microFIT Overview (ieso.ca)

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