



Beacon FIT Supplier

Digital User Guide
Person Management



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Getting Started

Disclaimer

This document shall be used for guidance purposes only and does not amend the 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	<p>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.</p> <p>Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the FIT Contract.</p>
Supplier Agent	<p>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.</p> <p>A Supplier Agent’s actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.</p>

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.

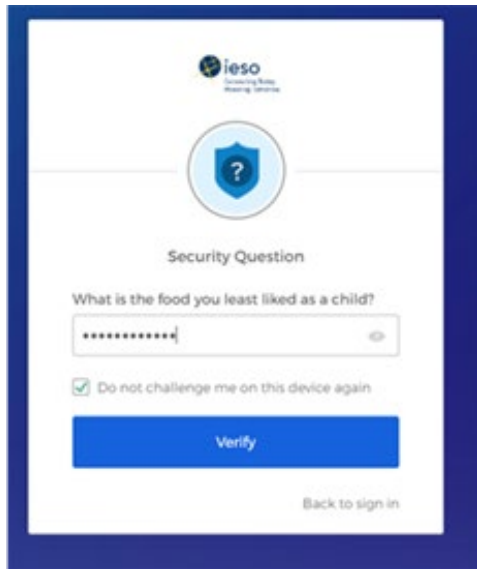
Sign in to Beacon

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

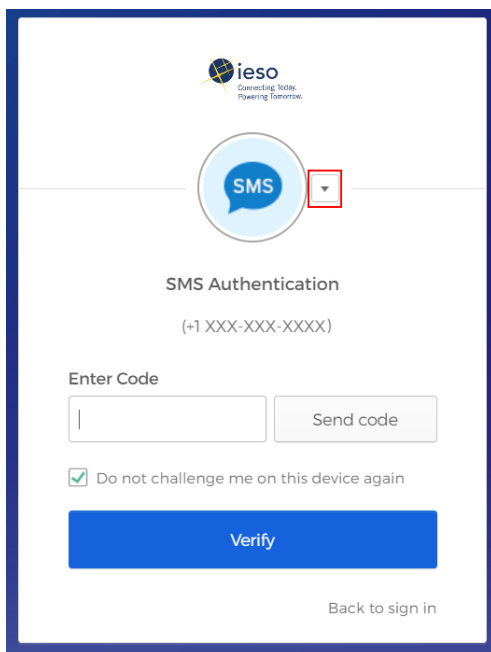
3. If you have set up Security Question Authentication you will be prompted to provide the answer to your security question. Note that the answer is case sensitive. Type in the answer to your security question that you set when you initially registered and click "Verify".



The screenshot shows the IESO login interface for Security Question Authentication. At the top is the IESO logo with the tagline "Generating Ideas. Powering Tomorrow." Below the logo is a circular icon containing a question mark. The text "Security Question" is centered. The question "What is the food you least liked as a child?" is displayed above a text input field filled with asterisks. To the right of the input field is an eye icon. Below the input field is a checked checkbox with the text "Do not challenge me on this device again". A large blue "Verify" button is centered below the checkbox. At the bottom right is a link that says "Back to sign in".

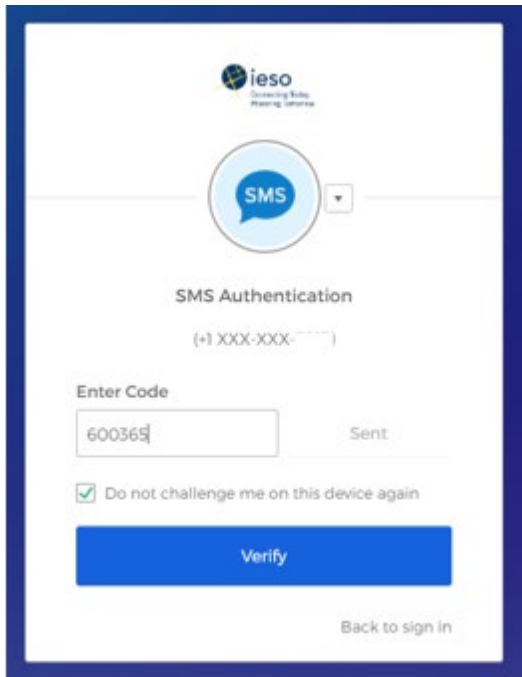
4. If you have set up SMS Authentication in addition to Security Question Authentication, you can choose which factor you will verify to login. One of the two will appear by default and you can switch to the other factor by selecting the drop-down menu arrow next to the authentication icon. You only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



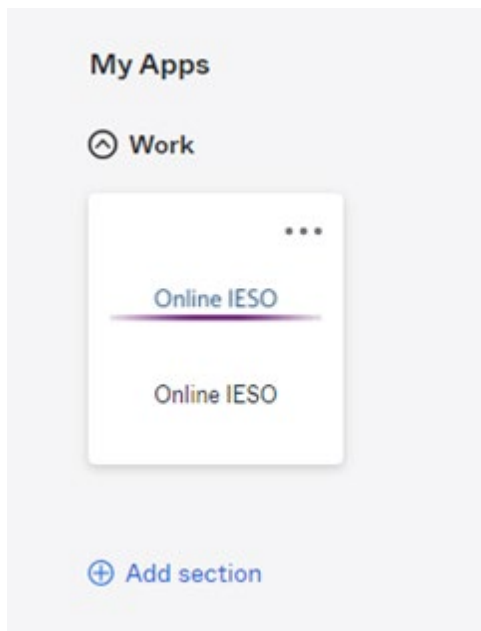
The screenshot shows the IESO login interface for SMS Authentication. At the top is the IESO logo with the tagline "Generating Ideas. Powering Tomorrow." Below the logo is a circular icon containing the text "SMS". To the right of the icon is a small square button with a downward arrow, highlighted with a red box. The text "SMS Authentication" is centered, followed by a placeholder number "(+1 XXX-XXX-XXXX)". Below this is the text "Enter Code" above a text input field. To the right of the input field is a "Send code" button. Below the input field is a checked checkbox with the text "Do not challenge me on this device again". A large blue "Verify" button is centered below the checkbox. At the bottom right is a link that says "Back to sign in".

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



The screenshot shows the IESO SMS Authentication interface. At the top is the IESO logo with the tagline "Connecting Today. Planning Tomorrow." Below the logo is a circular icon with "SMS" inside. The text "SMS Authentication" is centered, followed by a placeholder for a phone number "(+1 XXX-XXX-XXXX)". Underneath is a label "Enter Code" above a text input field containing "600365". To the right of the input field is a "Sent" button. Below the input field is a checkbox labeled "Do not challenge me on this device again" which is checked. At the bottom is a large blue "Verify" button. In the bottom right corner, there is a link "Back to sign in".

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



- 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.

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

FIT-microFIT Supplier



Start Supplier Request

*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.*

Retrofit



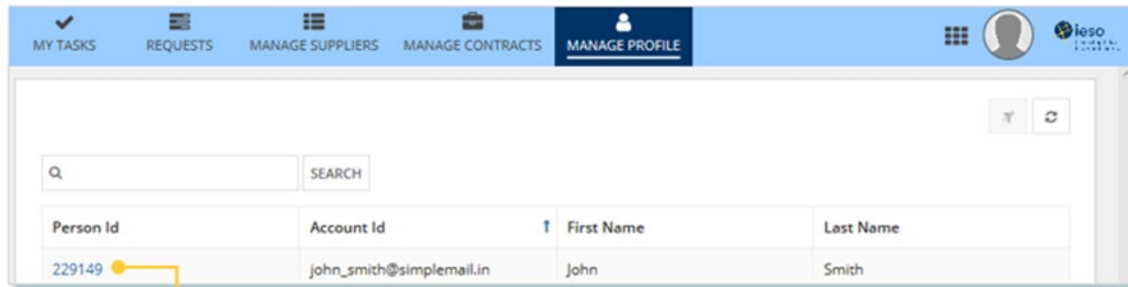
Register for Retrofit

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.

Person Overview

Manage Profile Page

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



MANAGE PROFILE			
Person Id	Account Id	First Name	Last Name
229149	john_smith@simplemail.in	John	Smith

To see a Person
Record, select the
Person ID.

Person Record Overview

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

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

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

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

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

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

To change your email address, select **Change to Email Address**.

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

Person: John Smith [669357]

Summary Requests Suppliers Contracts LDC Documents Related Actions

RECORD LOCKED

Request ID	Request Type	Date Requested	Requested By
P13092	Update to Contact Information	Mar 27, 2023 01:39 PM EST	John Smith

Contact Details

Person Id: 669357

Account Id: ieso.beacon+testassignee@gmail.com

Person Name: John Smith

Registration Date: Mar 27, 2023 01:31 PM EST

Contact Info

Address: 123 ABC Avenue, Toronto T1T 1T0, Albania.

Main Phone: 12345678960

Primary Email: ieso.beacon+testassignee@gmail.com

[Update Password and/or Challenge Questions](#)

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

To change your password and/or your security question(s). Select **Update Password and/or Challenge Questions**.

Managing Person Requests

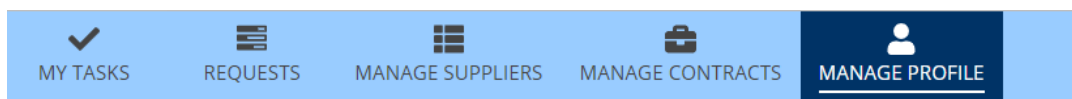
Changing Your Email Address

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

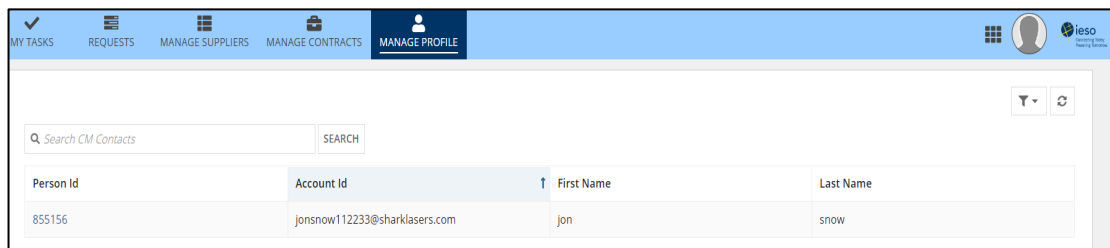
The following instructions will guide you through how to change the email address associated with the Person record in Beacon.

Procedure

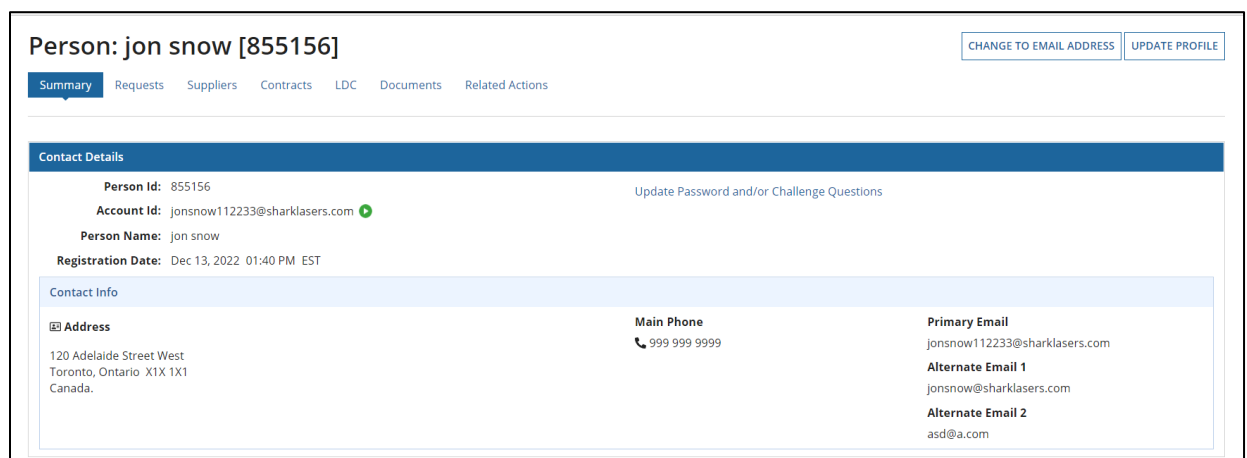
1. Select the **MANAGE PROFILE** tab.



2. Select the **Person Id**.

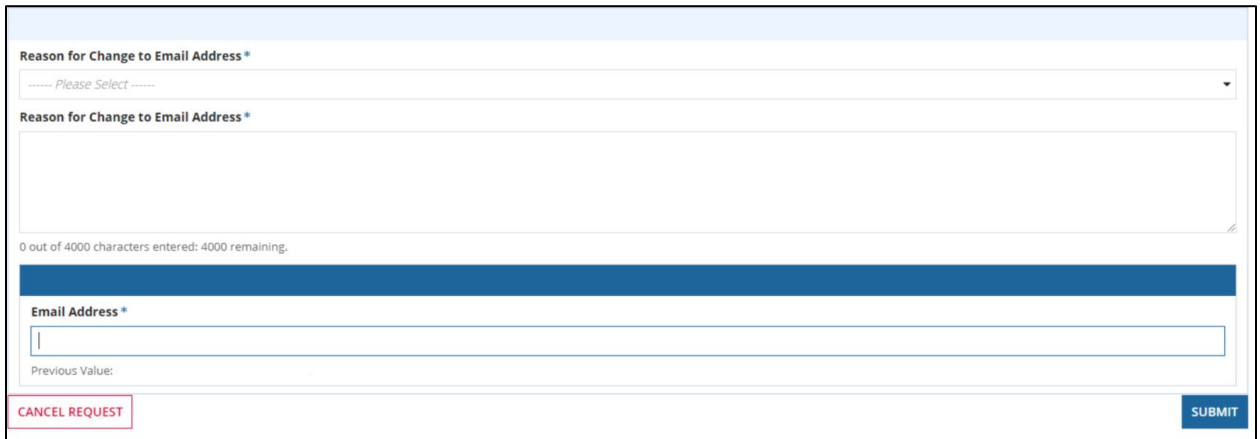


3. Select **CHANGE TO EMAIL ADDRESS** on the top right corner.



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 address in the **Email Address** field.
7. Click **SUBMIT**



The screenshot shows a web form with a light blue header. The first section is titled "Reason for Change to Email Address *" and contains a dropdown menu with the text "----- Please Select -----". Below this is a large text area for a description, also titled "Reason for Change to Email Address *". A character count below the text area reads "0 out of 4000 characters entered; 4000 remaining." A thick blue horizontal bar separates this section from the next. The second section is titled "Email Address *" and contains a text input field. Below the input field, it says "Previous Value:". At the bottom left is a red button labeled "CANCEL REQUEST", and at the bottom right is a blue button labeled "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.

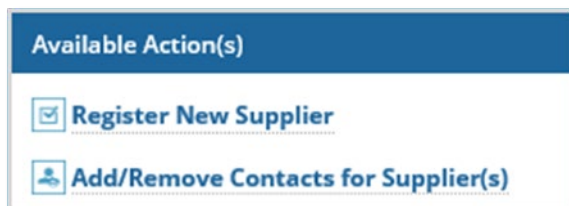
Adding Supplier Contacts to Supplier

Procedure

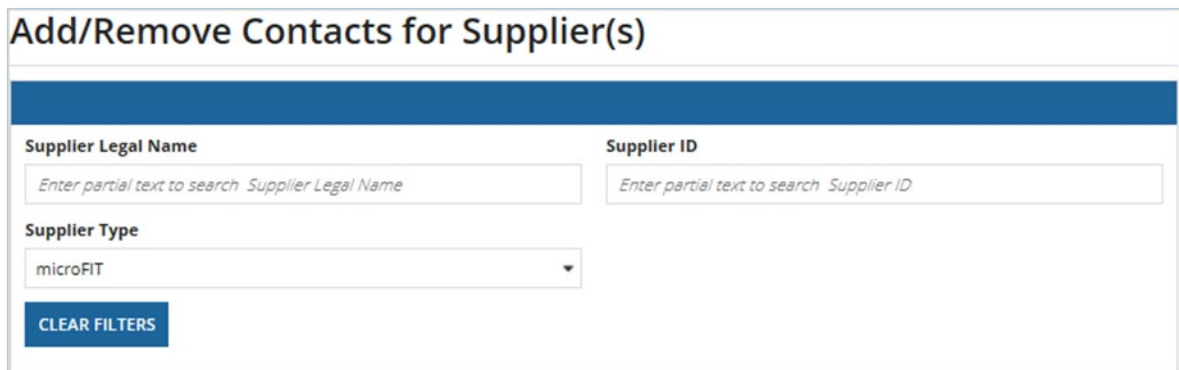
1. Select the **MANAGE SUPPLIERS** tab.



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.

The 'Add/Remove Contacts for Supplier(s)' page has a blue header. Below it, there are two search fields: 'Supplier Legal Name' and 'Supplier ID', each with placeholder text 'Enter partial text to search Supplier Legal Name' and 'Enter partial text to search Supplier ID' respectively. Below these is a 'Supplier Type' dropdown menu currently showing 'microFIT'. At the bottom left is a blue button labeled 'CLEAR FILTERS'.

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

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

<input type="checkbox"/>	Supplier Id	Supplier Legal Name	Supplier Type	Legal Entity Type
<input checked="" type="checkbox"/>	284207	123 Corporation	FIT	Corporation
<input type="checkbox"/>	836486	123 University	FIT	University
<input checked="" type="checkbox"/>	934358	ABC Corporation	FIT	Corporation

CLEAR SELECTION

Supplier(s) Selected [2]

Contact Request Type? *

☒ Add Contacts ☐ Remove Contacts

CANCEL **NEXT >**

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

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

NO **YES**

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

Submit Add Contact Person to Supplier/Contract

Add Contacts to Supplier Add to Contracts (Optional) Supporting Documents Review

Request - Add Contact Person to Supplier/Contract

Request Type: Add Contact Person to Supplier/Contract **Supplier:** Multiple Supplier(s) selected

Requested On: Jul 8, 2019 08:52 AM EST

Requested By: John Smith

Reason for Change *

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

Describe Reason for Change *

0 out of 4000 characters entered: 4000 remaining.

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

Search Contacts

Person Id

229149

Email Address

john_smith@simplemail.in

CLEAR

SEARCH

Contact Details

Click on +ADD button to add into the queue below

Person Id	Person Name	Email Address	
229149	John Smith	john_smith@simplemail.in	+Add Person

10. Choose a **Role**.

Selected Contacts - [1]

Person Id	Person Name	Email Address	Role	
229149	John Smith	john_smith@simplemail.in	<div>Select Role</div> <div><div>Select Role</div><div>Supplier Agent</div><div>Supplier Approver</div></div>	<div>×</div>

CANCEL REQUEST

NEXT >

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

12. **Optional:** On the **Add to Contracts (Optional)** page, select the Contracts related to the Supplier that you want to add the Contact(s) to.

Add Contracts to Supplier **Add to Contracts (Optional)** Supporting Documents Review

Find available contracts engaged with selected Supplier(s)

Available Contracts

For the selected contact(s) to be added in the contract(s), please select one or more contracts

	Business Contract ID	Status	Contract Version
<input type="checkbox"/>	- 123 Joint Venture (1 Contracts)		
<input type="checkbox"/>	FIT-MAAAAAA	Executed	4.1
<input type="checkbox"/>	- ABC Farmer Entity (1 Contracts)		
<input checked="" type="checkbox"/>	FIT-MBBBBBB	Executed	2.0

Selected Contacts - [1]

Person Id	Person Name	Email Address	Role
229149	John Smith	john_smith@simplemail.in	Supplier Agent

CANCEL REQUEST < BACK **NEXT >**

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.

Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD Drop file here

File size limit upto: 30 MB

Document Type *

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

Description

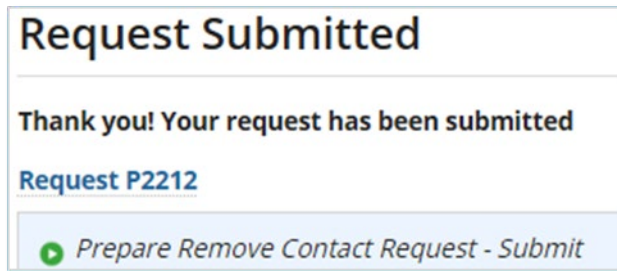
0 out of 200 characters entered: 200 remaining.

CANCEL **ADD DOCUMENT**

Note: When you 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.).

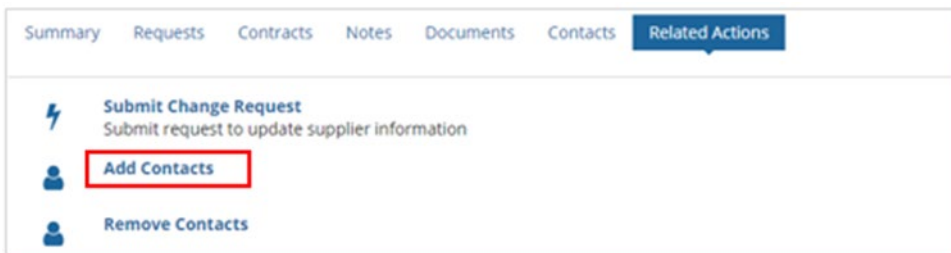
15. On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.

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**.



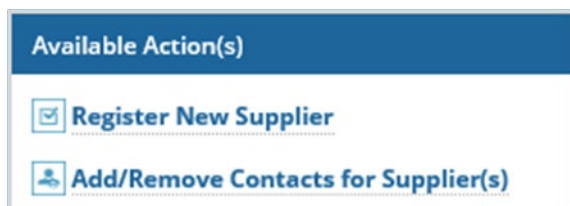
Removing Supplier Contacts from Suppliers

Procedure

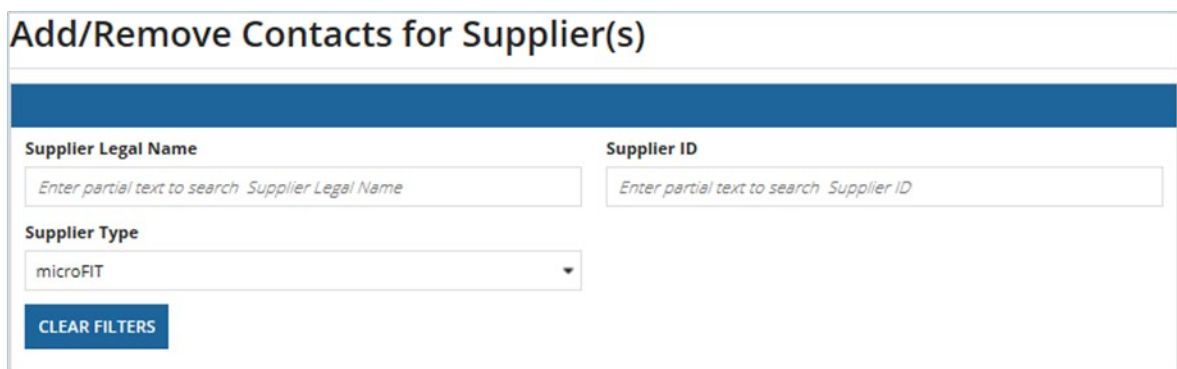
1. Select the **MANAGE SUPPLIERS** Suppliers tab.



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.

The 'Add/Remove Contacts for Supplier(s)' page has a white background with a blue header. Below the header, there are two search fields: 'Supplier Legal Name' and 'Supplier ID', each with placeholder text 'Enter partial text to search Supplier Legal Name' and 'Enter partial text to search Supplier ID' respectively. Below these is a 'Supplier Type' dropdown menu with 'microFIT' selected. At the bottom left is a blue button labeled 'CLEAR FILTERS'.

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

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

<input type="checkbox"/>	Supplier Id	Supplier Legal Name	Supplier Type	Legal Entity Type
<input checked="" type="checkbox"/>	284207	123 Corporation	FIT	Corporation
<input type="checkbox"/>	836486	123 University	FIT	University
<input checked="" type="checkbox"/>	934358	ABC Corporation	FIT	Corporation

CLEAR SELECTION

Supplier(s) Selected [2]

Contact Request Type? *

☐ Add Contacts ☒ Remove Contacts

CANCEL **NEXT >**

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

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

NO **YES**

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

Submit Remove Contact Person from Supplier/Contract

Remove Contacts from Supplier Remove from Contracts (Mandatory) Supporting Documents Review

Request - Remove Contact Person from Supplier/Contract

Request Type: Remove Contact Person from Supplier/Contract **Supplier:** Multiple Supplier(s) selected

Requested On: Jul 30, 2019 10:15 AM EST

Requested By: John Smith

Reason for Change *

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

Describe Reason for Change *

0 out of 4000 characters entered: 4000 remaining.

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.

Available Contacts				
NOTE: Select at least one contact from selected supplier(s). Suppliers having one Approver cannot be selected				
<input type="checkbox"/>	Person Id	Person Name	Email Address	Role
<input type="checkbox"/>	- ABC Corporation (4 Contacts)			
<input type="checkbox"/>	• 001234	Jane Doe Supplier	email123@sharklasers.com	Supplier Approver
<input checked="" type="checkbox"/>	• 001235	John Smith	emailabc@sharklasers.com	Supplier Approver
<input checked="" type="checkbox"/>	• 001236	Paul Smith	email456@sharklasers.com	Supplier Approver

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.

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 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**.

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

NO


YES

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

Request Submitted

Thank you! Your request has been submitted


[Request P2212](#)

 Prepare Remove Contact Request - Submit


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**


SummaryRequestsContractsNotesDocumentsContactsRelated Actions



Submit Change Request
Submit request to update supplier information



Add Contacts

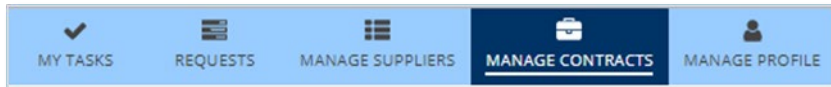


Remove Contacts

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.

Available Action(s)
[Submit Contract Changes](#)
[Create New Secured Lender Agreement](#)
[Re-Assign Contracts](#)

Contract Id

Supplier Type

Contract Version

Supplier Id

LDC

Supplier Legal Name


Locked By

Contract Status

Lock Status

Paging: [10](#) | [25](#) | [50](#) | [Show All](#)

9 Contracts

	Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
	F-001234-SPV-123-123	FIT	COD	934358	ABC Corporation		1.3.0

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**.

The screenshot shows a horizontal navigation bar with tabs: Summary, Facility Information, Requests, Documents, Notes, Contacts, Pricing, Milestones, and Related Actions. The 'Related Actions' tab is active and highlighted in blue. Below the tabs, there is a list of five actions, each with an icon and a description:

- Change to Contract Notice Mailing Address** (lightning bolt icon): Use this request type to update the Contract Contact & Notice Information.
- Change to Facility Information** (building icon): Use this request type to update Facility Information.
- Contract Assignment** (handshake icon): Use this request type to assign a contract to another Supplier.
- Termination** (X icon): Use this request type to terminate your Contract.
- Add Contacts** (person icon):

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

The screenshot shows the 'Add Contacts to Contract' page with three tabs: Add Contacts To Contract, Supporting Documents, and Review. The 'Add Contacts To Contract' tab is active. Below the tabs, there is a blue header bar that reads 'Request - Add Contact Person to Supplier/Contract'. The main content area contains the following information:

- Contract ID:** F-001234-SPV-123-123
- Supplier Type:** FIT
- Requested By:** John Smith
- Submission Reason ***: A dropdown menu with the text '----- Please Select -----' and a downward arrow.
- Describe Reason for Request**: A large text area for entering a description.

At the bottom of the text area, it says '0 out of 4000 characters entered: 4000 remaining.'

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

The screenshot shows the 'Search Contacts' page. It has a blue header bar with the text 'Search Contacts'. Below the header, there are two input fields: 'Person Id' with the value '229149' and 'Email Address' with the value 'john_smith@simplemail.in'. There are 'CLEAR' and 'SEARCH' buttons. Below the search fields, there is a section titled 'Contact Details' with the instruction 'Click on +ADD button to add into the queue below'. It contains a table with the following data:

Person Id	Person Name	Email Address	
229149	John Smith	john_smith@simplemail.in	+Add Person

8. Choose a Role.

Person Id	Person Name	Email Address	Role	
229149	John Smith	john_smith@simplemail.in	Select Role	X

CANCEL REQUEST

Next >

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.

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 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

Request Submitted

Thank you! Your request has been submitted

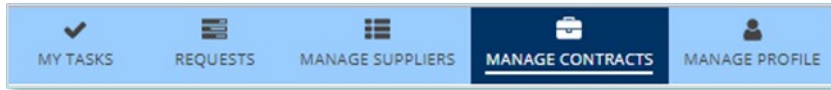
Request P2212

Prepare Add Contact Request - Submit

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.

Available Action(s)

- [Submit Contract Changes](#)
- [Create New Secured Lender Agreement](#)
- [Re-Assign Contracts](#)

Contract Id

Supplier Type

Contract Version

Supplier Id

LDC

Supplier Legal Name


Locked By

Contract Status

Lock Status


Paging: [10](#) | [25](#) | [50](#) | [Show All](#)


9 Contracts


	Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
	F-001234-SPV-123-123	FIT	COD	934358	ABC Corporation		1.3.0


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


Summary Facility Information Requests Documents Notes Contacts Pricing Milestones **Related Actions**


 **Change to Contract Notice Mailing Address**
Use this request type to update the Contract Contact & Notice Information.

 **Change to Facility Information**
Use this request type to update Facility Information.

 **Contract Assignment**
Use this request type to assign a contract to another Supplier

 **Termination**
Use this request type to terminate your Contract.

 **Add Contacts**

 **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.

Available Contacts

NOTE: Select atleast one contact from selected contract(s). Contracts having one Approver cannot be selected

<input type="checkbox"/>	Person Id	Name	Email Address	Role
<input type="checkbox"/>	F-001234-SPV-123-123 (2 Contacts)			
<input type="checkbox"/>	• 123456	John Smith	email123@email.com	Supplier Approver
<input checked="" type="checkbox"/>	• 001234	Jane Doe	emailabc@email.com	Supplier Agent

CANCEL REQUEST**NEXT >**

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.

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 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

Request Submitted

Thank you! Your request has been submitted

[Request P2212](#)

 [Prepare Remove Contact Request - Submit](#)

Person Request Tasks

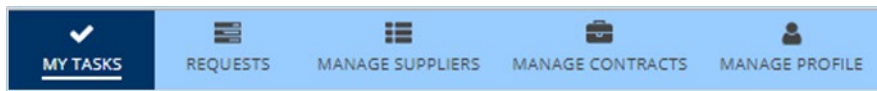
Reviewing Requests Submitted by a Supplier Approver

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

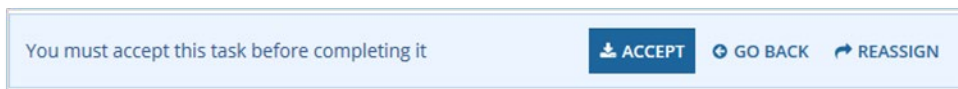
1. Select the **MY TASKS** tab.



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

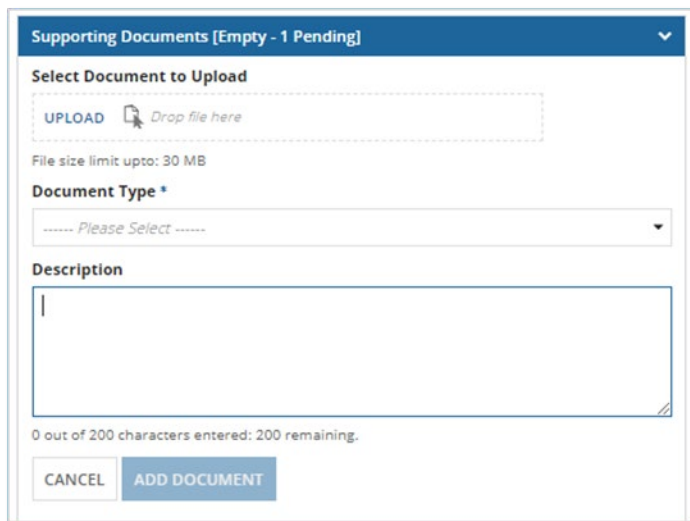
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	<input checked="" type="checkbox"/>

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



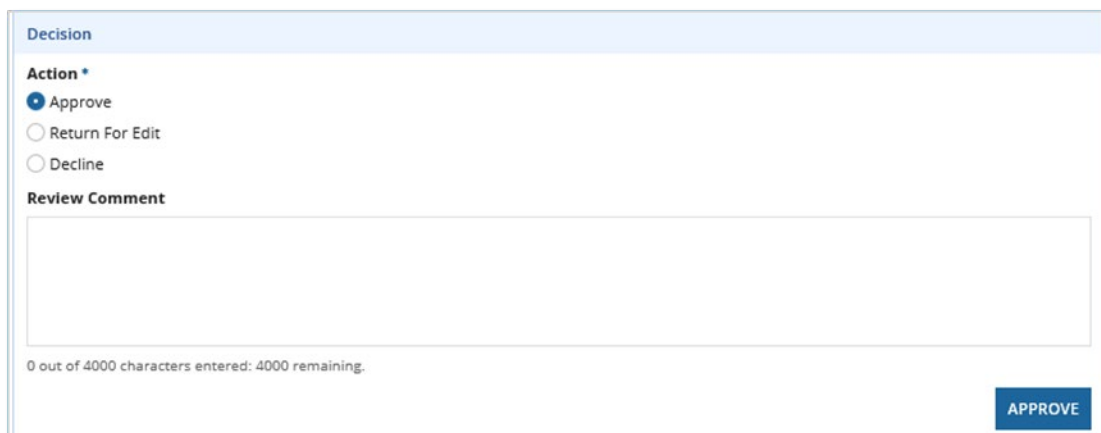
4. Review the values entered and the documents in the Request.

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.



The screenshot shows a form titled "Supporting Documents [Empty - 1 Pending]". It includes a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" instruction. Below this is a "File size limit upto: 30 MB" note. The "Document Type" is selected via a dropdown menu showing "----- Please Select -----". A "Description" text area is present, with a character count at the bottom: "0 out of 200 characters entered: 200 remaining." At the bottom of the form are "CANCEL" and "ADD DOCUMENT" buttons.

6. Under Decision, choose either Approve, Return for Edit or Decline.
- If you select **Approve**, you can enter an explanatory note or comment to provide additional context to the review task, and then select **Approve**.
 - 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**.
 - 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**.



The screenshot shows a form titled "Decision". It features an "Action *" section with three radio buttons: "Approve" (selected), "Return For Edit", and "Decline". Below this is a "Review Comment" text area, with a character count at the bottom: "0 out of 4000 characters entered: 4000 remaining." An "APPROVE" button is located at the bottom right of the form.

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.

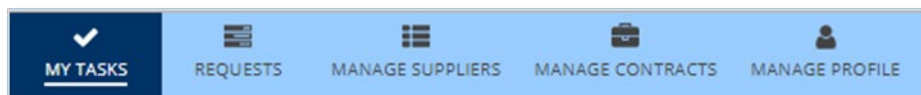
Providing Clarification for Returned Requests

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.

The screenshot shows a table titled 'Active Request Tasks In-Progress'. The first row is highlighted, showing a request with ID S3170, type 'Change to Supplier Legal Name', status 'IESO Review', and source 'Supplier'. The 'Active Task' column for this row is 'Review Returned Change Request', which is highlighted with a red box. A yellow line connects this box to a zoomed-in view of the task details below. The zoomed-in view shows the 'Source' as 'Supplier' and the 'Active Task' as 'Review - Supplier Rejected Request', also highlighted with a red box. A status icon (a red square with a white checkmark) is visible in the 'Status' column of both views.

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

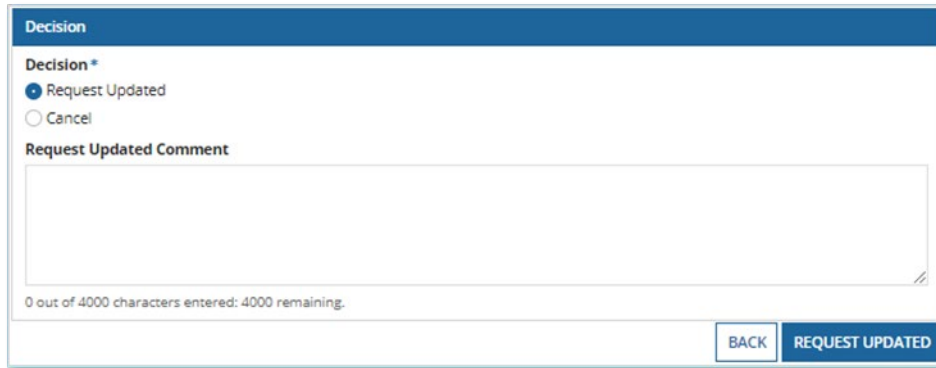
Source	Active Task	Status
Supplier	Review - Supplier Rejected Request	

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.

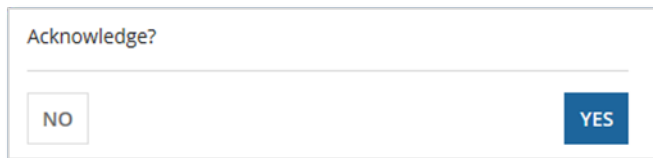
6. Review the changes summarized on the **Review** page.
7. Under Decision, choose either Request Updated or Cancel.
 - a. If you select Request Updated, you can enter an explanatory note or comment to provide additional context on what was clarified, and then select **Request Updated**.

- 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**.



A dialog box titled "Decision" with a blue header bar. Below the header, there is a section labeled "Decision *" with two radio button options: "Request Updated" (which is selected) and "Cancel". Below these options is a text area labeled "Request Updated Comment". At the bottom left of the text area, it says "0 out of 4000 characters entered: 4000 remaining.". At the bottom right, there are two buttons: "BACK" and "REQUEST UPDATED".

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



A dialog box titled "Acknowledge?". It has a text input field. Below the input field, there are two buttons: "NO" and "YES".

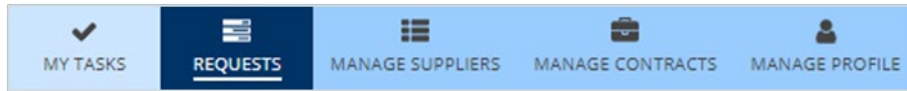
Cancelling a Submitted Request

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.

The screenshot shows a filter section with the following fields:

- Status:** A dropdown menu with 'OPEN' selected.
- Request ID:** A text input field.
- Request Category:** A dropdown menu with '----- Show All -----' selected.
- Request Type:** A dropdown menu with '----- Show All -----' selected.
- Supplier ID:** A text input field with placeholder text 'Enter partial text to search Supplier ID'.
- Contract ID:** A text input field with placeholder text 'Enter partial text to search Contract ID'.
- Prepared By:** A dropdown menu with '----- Show All -----' selected.
- Source:** A dropdown menu with '----- Show All -----' selected.
- Requested From:** A date input field with placeholder text 'mm/dd/yyyy'.
- Requested Thru:** A date input field with placeholder text 'mm/dd/yyyy'.

At the bottom, it says '7 Requests Found'.

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

2 Requests Found		
		Request ID
OPEN		C379
OPEN		C299

4. Select **CANCEL REQUEST**.

Request C379 - Change to Participation Information

CANCEL REQUEST

Summary Attachments Related Actions

OPEN

Submitted IESO Review Closed

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

Confirm Cancellation of Request S3172

Please confirm that you would like to cancel this request. You will lose all information and will not be able to recover the request.

Prepare Change Request - Submit

Time	Performed By	Role	Reason
Jul 16, 2019 10:27 AM EST	John Smith	Supplier Approver	Changing the Legal Name of the Supplier

Comment
Updating legal name

Request - Change to Supplier Legal Name

Describe Reason for Cancelling Request *

0 out of 4000 characters entered: 4000 remaining.

BACK

CANCEL REQUEST

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

Are you sure?

NO

YES

8. Refresh your page.

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

Request C379 - Change to Participation Information

[Summary](#)[Attachments](#)[Related Actions](#)

CLOSED

Submitted

IESO Review

Closed

Close Request - Closed

Time	Performed By	Role	Reason
Dec 06, 2019 01:49 PM EST	SYSTEM - AUTO	IESO	

Comment

< No Comment >

Request - Change to Participation Information

Request ID: C379

Contract ID: [F-111111-SPV-222-333](#)

Supplier Type: FIT

Requested On: Dec 06, 2019 01:47 PM EST

Requested By: Jebediah Smith

Submission Reason: Decrease to Participation Level

Submission Explanation: We are decreasing our Participation %.

Outcome: Cancelled

Reviewed By: Jebediah Smith

Reviewed On: Dec 06, 2019 01:49 PM EST

Completed On: Dec 06, 2019 01:49 PM EST

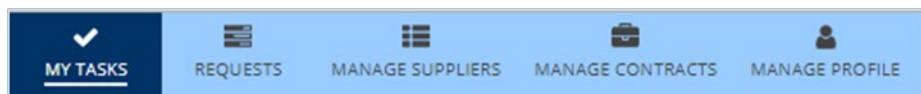
Providing Acknowledgement of a Request Outcome

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

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

Procedure

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



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

Active Request Tasks In-Progress				
Request ID	Request Type	Status	Source	Active Task
C4664	Contract Assignment	Pending Acknowledgement	Supplier	Provide Acknowledgement

Personalized messages from the IESO will appear here.

Request C4664 Approved - Please Acknowledge

Submitted	IESO Review	Pending Acknowledgement	Closed
-----------	-------------	-------------------------	--------

Message to Assignee [Contract Assignment]

✉ Dear John Smith

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

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

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

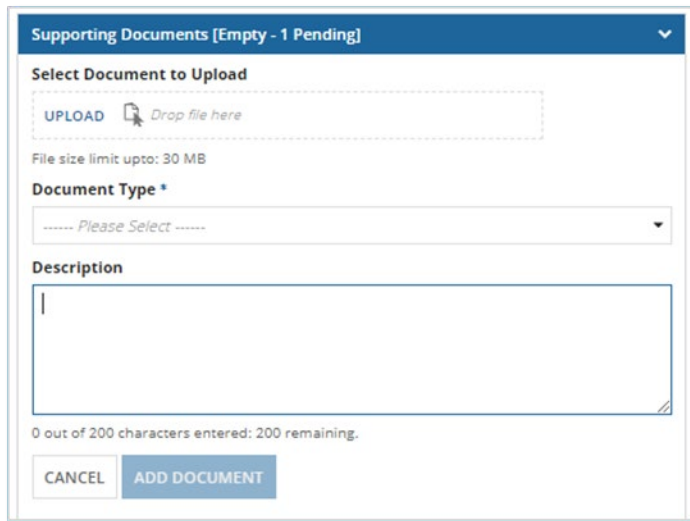
Regards,

Frank Approver
devon.beare@ieso.ca

IESO Contract Management Team

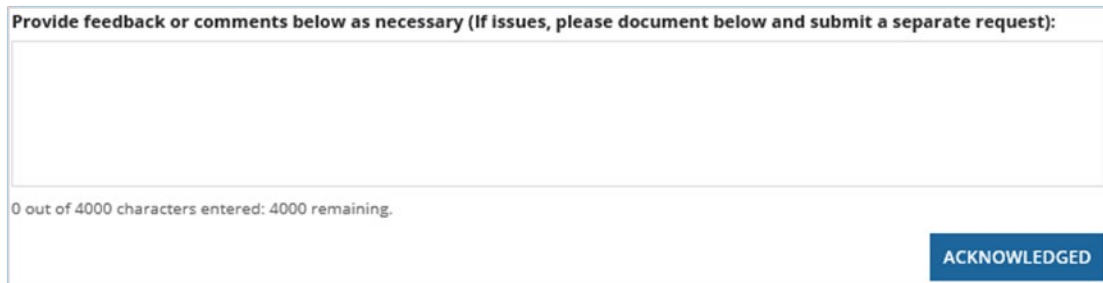
3. Review the information and any documents added by other users.

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



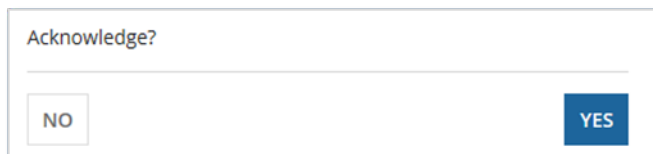
The screenshot shows a web form titled "Supporting Documents [Empty - 1 Pending]". It includes a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" area. Below this is a "File size limit upto: 30 MB" note. The "Document Type *" field is a dropdown menu currently showing "----- Please Select -----". The "Description" field is a large text area with a character count at the bottom: "0 out of 200 characters entered: 200 remaining." At the bottom of the form are two buttons: "CANCEL" and "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.



The screenshot shows a feedback form with the heading "Provide feedback or comments below as necessary (If issues, please document below and submit a separate request):". It features a large text area for comments. At the bottom left, it shows "0 out of 4000 characters entered: 4000 remaining." At the bottom right is a blue button labeled "ACKNOWLEDGED".

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



The screenshot shows a dialog box titled "Acknowledge?". It has two buttons at the bottom: "NO" and "YES".

Viewing Request Notifications

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

Procedure

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

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

24 Requests Found

		Request ID	Request Type	Requested	Requested By	Prepared By	Supplier ID	Final Outcome Decision Date
CLOSED	×	C380	Change to Participation Information	Dec 06, 2019 02:09 PM EST	Jebediah Smith	Jebediah Smith	002668	Dec 06, 2019 02:10 PM EST

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

24 Requests Found				
		Request ID	Request Type	Requested
CLOSED	×	C380	Change to Participation Information	Dec 06, 2019 02:09 PM EST

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

Summary **Message to Supplier** Attachments Related Actions

Notification to Supplier [Change to Participation Information]

Dear Jebediah Smith, Betty King,

Please note that the IESO has completed its review of the request submitted for the subject FIT Contract(s).

Request ID: C380
Request Type: Change to Participation Information
Request Outcome: Declined

If you have any questions, please don't hesitate to contact the IESO Contract Management Team via email.

Regards,
IESO Contract Management Team

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

Summary Message to Supplier **Attachments** Related Actions

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

<input checked="" type="checkbox"/>	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By	Available On
<input checked="" type="checkbox"/>	FIT_Contract Document_1.3.0_ContractID_81540			Contract Document	Joshua Acosta	Dec 06, 2019 02:21 PM EST
<input checked="" type="checkbox"/>	les-triplettes-de-belleville		My Participation doc.	Prescribed Form: Participation Declaration (Aboriginal)	Jebediah Smith	Dec 06, 2019 02:18 PM EST

Documents selected - [2]

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

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

A Task will be created to Download document. Refresh the page to view the task link below

9. Refresh your page.

10. Select **DOWNLOAD DOCUMENTS**.

Download Documents

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

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

11. Select a document name to begin downloading it.

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

Download Documents

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

Document Name

Document #1

DONE

12. Select **DONE**.

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

The task will be cleared and you will have to generate a new request to download these documents. Are you sure you want to close it?


NOYES

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	Contracts	Related Actions
---------	----------	-----------	-------	-----------	-----------	-----------------

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

Summary	Requests	Contracts	Notes	Documents	Contracts	Related Actions
Request ID <input type="text" value="Enter partial text to search for Request Id"/>		Document Type <input type="text" value="----- Please Select -----"/>				
Document Name <input type="text" value="Enter partial text to search for Document Name"/>		Document Description <input type="text" value="Enter partial text to search for description"/>				
IESO Document Name <input type="text" value="Enter partial text to search for IESO Document Name"/>						
<input type="button" value="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

<input checked="" type="checkbox"/>	Request ID	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By	Available On
<input checked="" type="checkbox"/>	S3167	African_Lion	Document 2	Supporting document 2	New Supplier Registration Supporting Document	John Smith	Jul 16, 2019 09:25 AM EST
<input checked="" type="checkbox"/>	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

8. Refresh your page.

9. Select **Download Documents**.

Download Documents

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

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

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

Download Documents

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

Document Name
Document #1
Document #2

DONE

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

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

The task will be cleared and you will have to generate a new request to download these documents. Are you sure you want to close it?

NO **YES**

Additional Resources

Additional resources can be found at the following links:

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

**Independent Electricity
System Operator**

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

E-mail: FIT.Contract@ieso.ca

ieso.ca



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