



BEACON

microFIT Supplier

DIGITAL USER GUIDE

Verification Tasks

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Connecting Today.
Powering Tomorrow.



Getting Started

Disclaimer

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

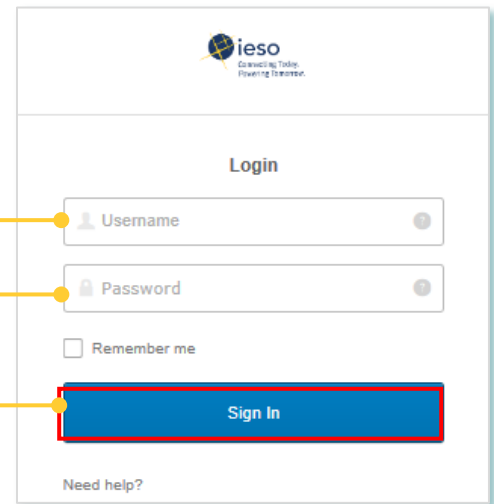
Role	Description
Supplier Approver	<p>The Supplier Approver is the microFIT Contract counterparty or an individual who has the authority to act on the behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to “you” and “your” throughout this user guide are references to a Supplier Approver.</p> <p>Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.</p>
Supplier Agent	<p>The Supplier Agent is an <i>optional</i> 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.</p> <p>A Supplier Agent cannot submit or review requests to the IESO.</p>
IESO	<p>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.</p>

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.

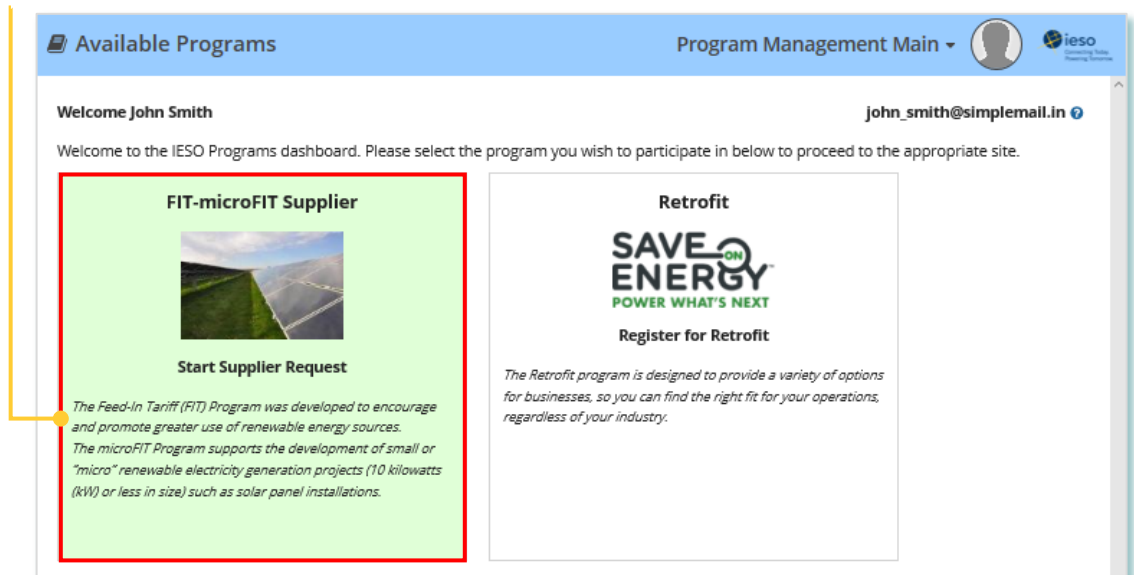
Procedure

- 01** Go to <http://www.ieso.ca/Get-Involved/microfit/login>.
- 02** Enter your account username and password.
- 03** Select **Sign In**.



This brings you to the **Available Programs** dashboard.

- 04** Select the **FIT-microFIT Supplier** program tile.



This brings you to the **My Tasks** page in Beacon.



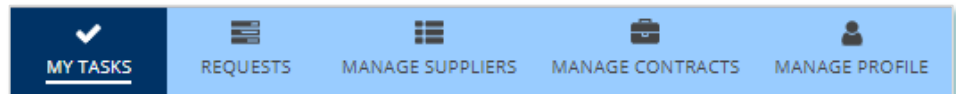
Managing Verification Tasks

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

01 Select the **My Tasks** tab.



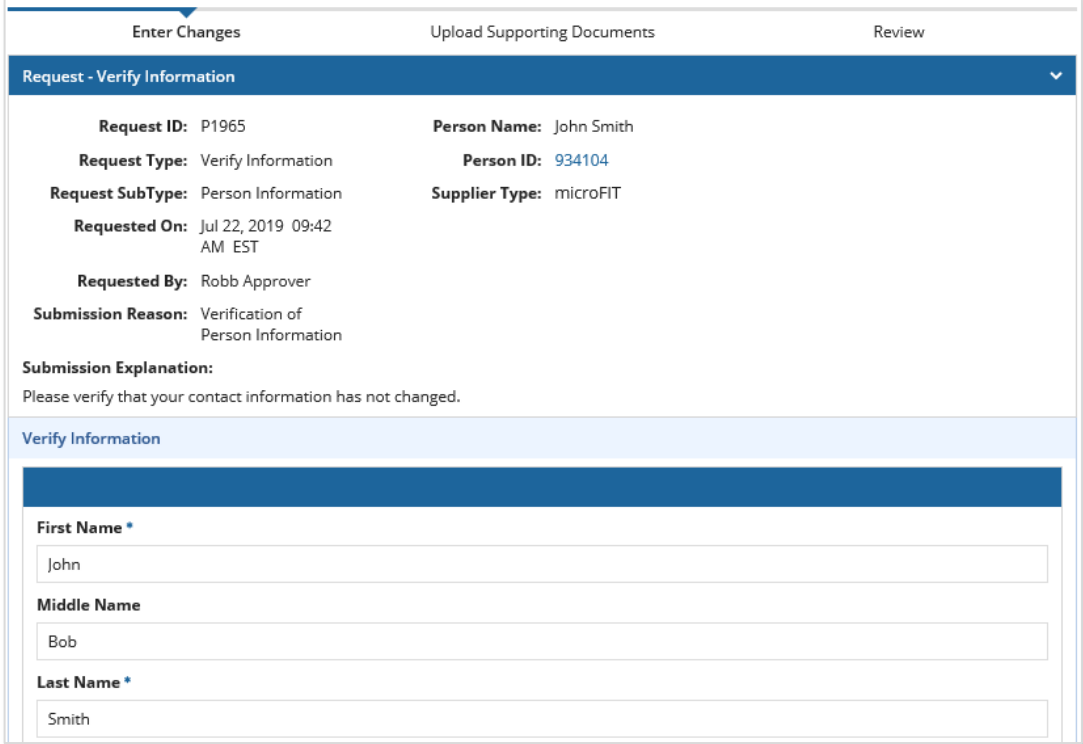
02 Select **Complete Person Verification** for the Request that you want to work on.

Active Request Tasks In-Progress				
Request ID	Request Type	Status	Source	Active Task
P1965	Verify Information	Submitted	IESO	Complete Person Verification

This brings you to the **Enter Changes** page.

03 If your contact information has changed then update your contact information, and then select

NEXT >



The screenshot shows a web interface with three tabs: 'Enter Changes', 'Upload Supporting Documents', and 'Review'. The 'Enter Changes' tab is active, displaying details for a 'Request - Verify Information'.

Request - Verify Information

- Request ID:** P1965
- Request Type:** Verify Information
- Request SubType:** Person Information
- Requested On:** Jul 22, 2019 09:42 AM EST
- Requested By:** Robb Approver
- Submission Reason:** Verification of Person Information
- Submission Explanation:** Please verify that your contact information has not changed.

Person Name: John Smith
Person ID: 934104
Supplier Type: microFIT

Verify Information

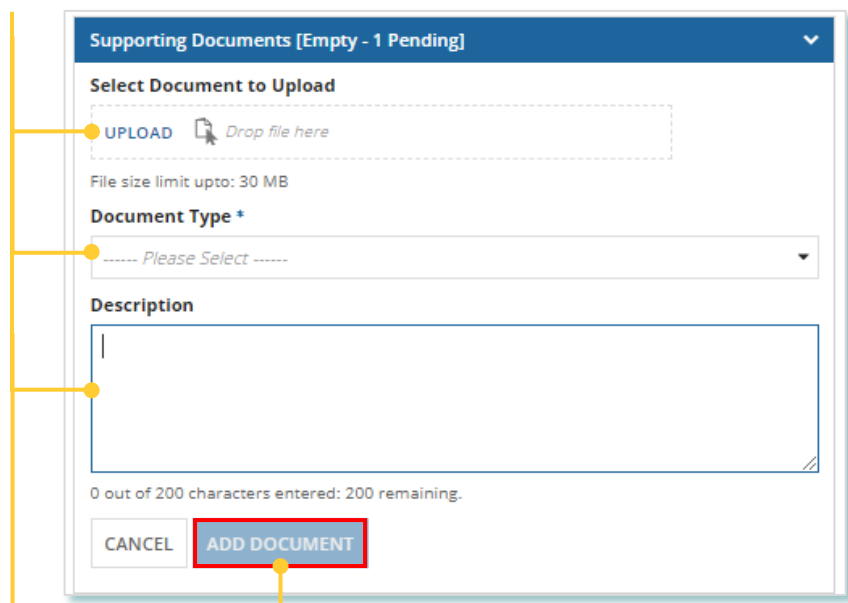
First Name *
John

Middle Name
Bob

Last Name *
Smith

04 Optional: On the **Upload Supporting Documents** page, select **+UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.



The screenshot shows a modal window titled 'Supporting Documents [Empty - 1 Pending]'. It contains the following fields and buttons:

- Select Document to Upload:** Includes an 'UPLOAD' button and a 'Drop file here' area.
- File size limit upto:** 30 MB
- Document Type *:** A dropdown menu with the text '----- Please Select -----'.
- Description:** A text area with a character count: '0 out of 200 characters entered: 200 remaining.'
- Buttons:** 'CANCEL' and 'ADD DOCUMENT' (highlighted with a red box).

Yellow lines with circular markers point to the 'UPLOAD' button, the 'Document Type' dropdown, the 'Description' text area, and the 'ADD DOCUMENT' button.

You can upload additional documents or select **NEXT >**

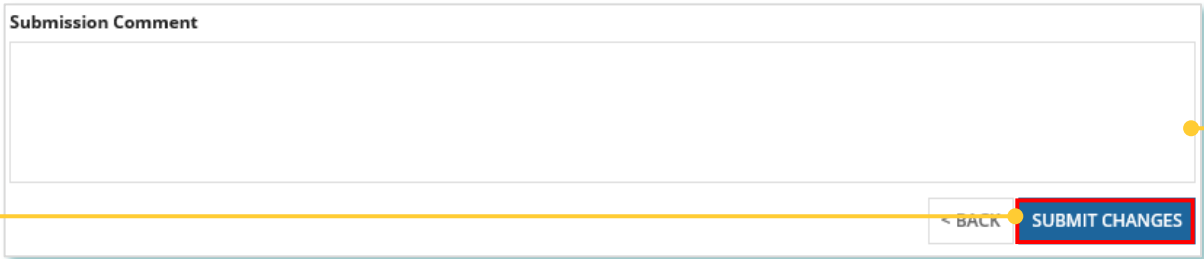
Note: If there have been any material changes to your personal contact information (e.g. a name change), you might be required to submit certain documentation as evidence of the change.

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

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

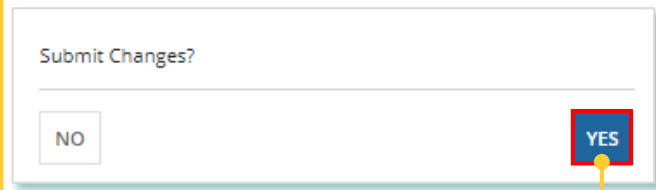
07 Select **SUBMIT CHANGES**.

If you didn't make any changes, select **VERIFY NO CHANGES**.



The screenshot shows a form with a text area labeled "Submission Comment". Below the text area are two buttons: a blue button with a left-pointing arrow and the text "BACK", and a red button with the text "SUBMIT CHANGES". A yellow line highlights the "SUBMIT CHANGES" button and the "Submission Comment" field.

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



The screenshot shows a dialog box titled "Submit Changes?". It contains two buttons: a white button with the text "NO" and a red button with the text "YES". A yellow line highlights the "YES" button.

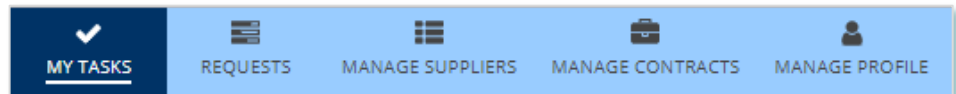
Once the Request is submitted, a confirmation page is displayed.

Completing a Supplier Verification Task

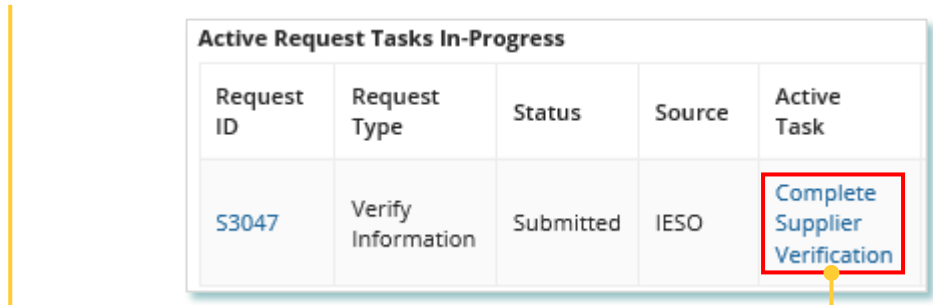
After your Person Verification task has been submitted and approved by the IESO, you will be asked to verify the information related to your Supplier(s). This will be initiated through a Supplier Verification task that will appear on your **My Tasks** page. The purpose of this task is to verify that 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

01 Select the **My Tasks** tab.



02 Select **Complete Supplier Verification** for the Request that you want to work on.



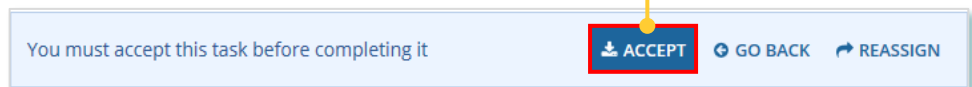
A table titled 'Active Request Tasks In-Progress' with the following data:

Request ID	Request Type	Status	Source	Active Task
53047	Verify Information	Submitted	IESO	Complete Supplier Verification

The 'Complete Supplier Verification' cell in the 'Active Task' column is highlighted with a red box. A yellow line connects this box to the 'ACCEPT' button in the next step.

This brings you to the **Enter Changes** page.

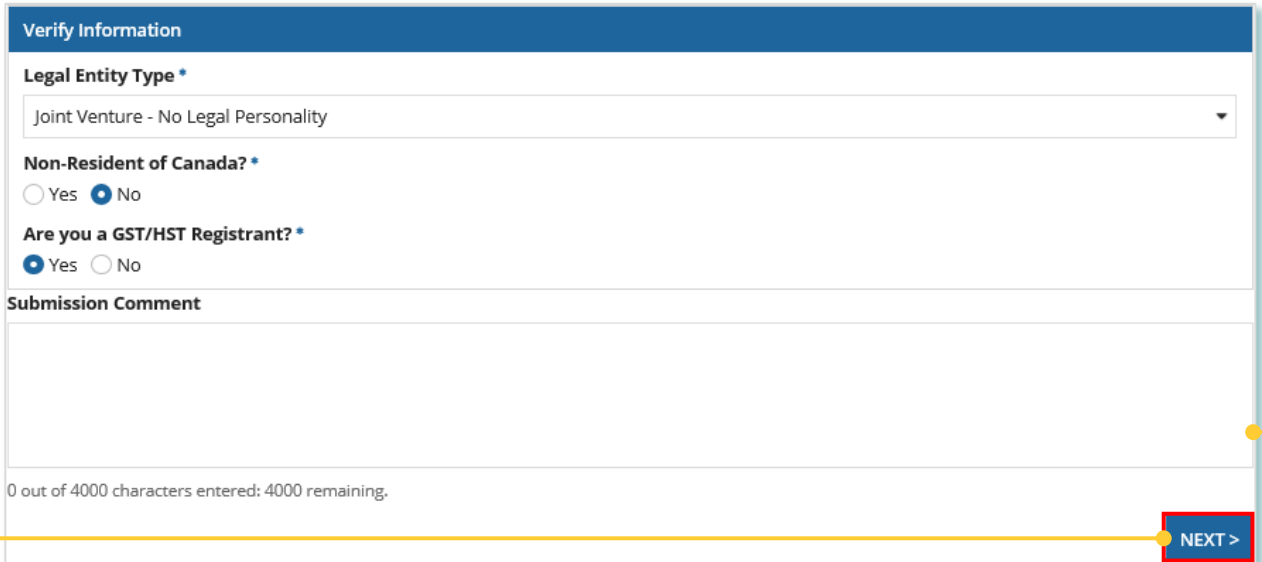
03 To begin working on the task, select **ACCEPT**.



04 If your Supplier information has changed then update your Supplier information.

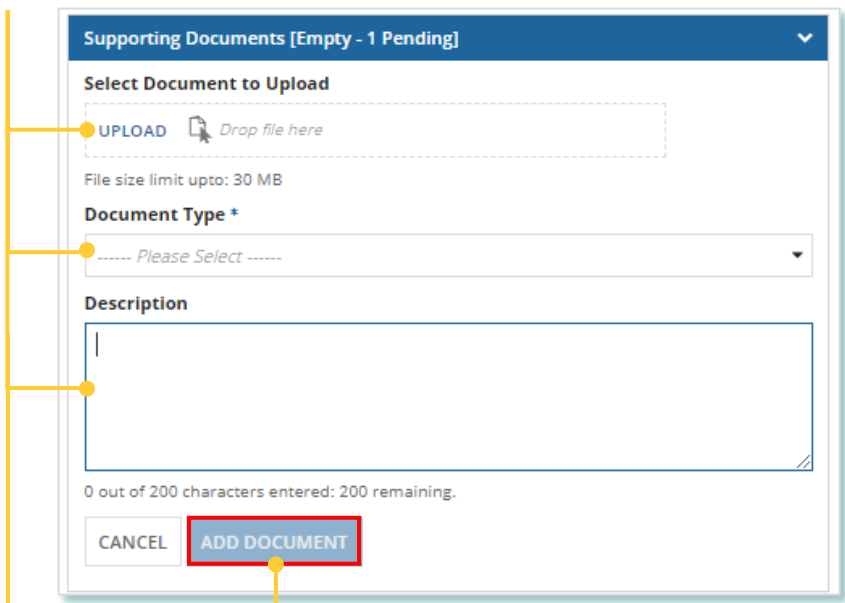
05 Optional: You can enter an explanatory note or comment to provide additional context to a submitted change in the **Submission Comment** field.

06 Select **NEXT >**.



07 Optional: On the **Upload Supporting Documents** page, select **+UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, provide a description, and then select **ADD DOCUMENT**.



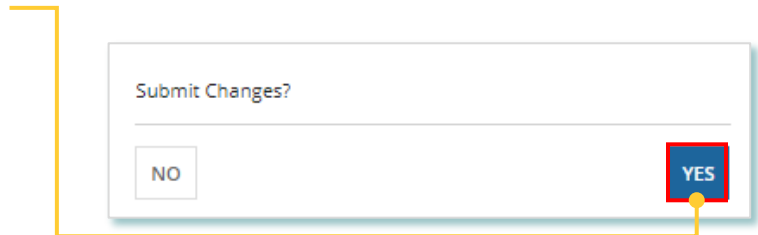
You can upload additional documents or select **NEXT >**.

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

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

If you didn't make any changes, select **VERIFY NO CHANGES**.

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



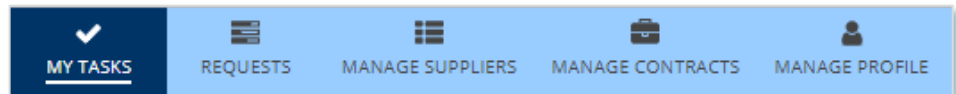
Once the Request is submitted, a confirmation page is displayed.

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

01 Select the **My Tasks** tab.

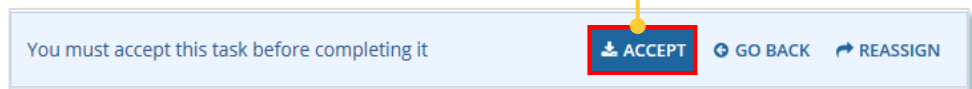


02 Select **Complete Contract Verification** for the Request that you want to work on.

Active Request Tasks In-Progress				
Request ID	Request Type	Status	Source	Active Task
C4260	Verify Information	Submitted	IESO	Complete Contract Verification

This brings you to the **Enter Changes** page.

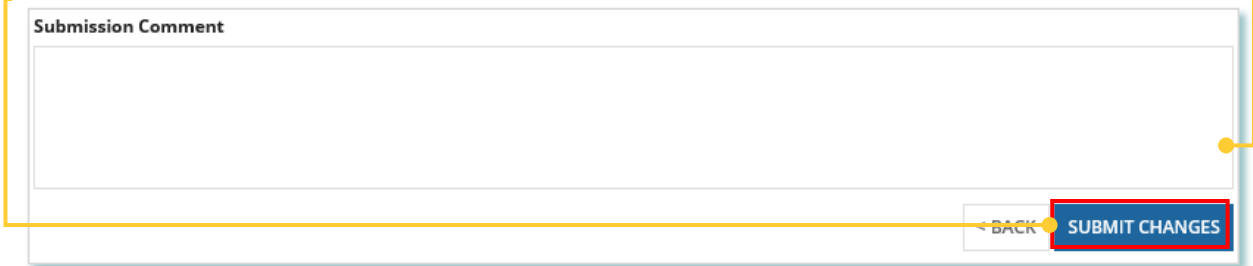
03 To begin working on the task, select **ACCEPT**.



04 If your Contract information has changed then update your Contract information.

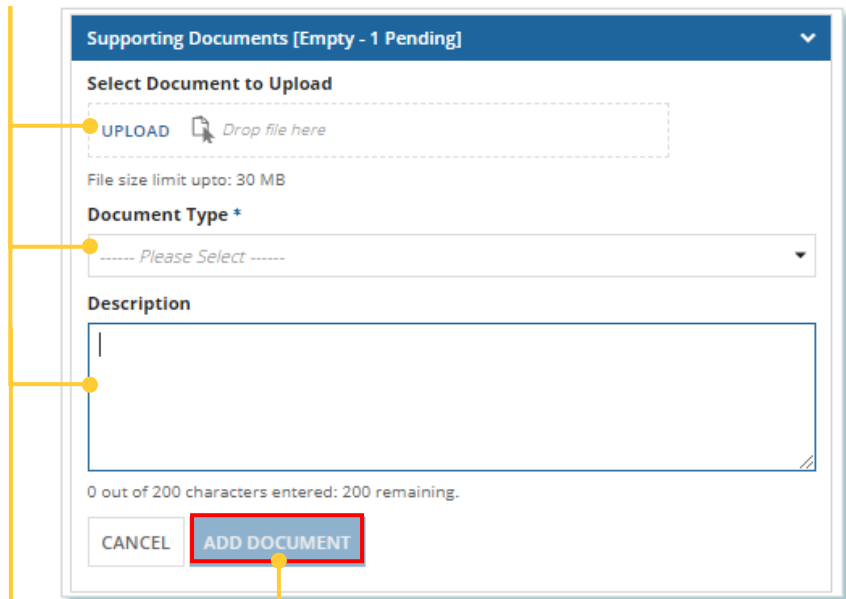
05 Optional: You can enter an explanatory note or comment to provide additional context to a submitted change in the **Submission Comment** field.

06 Select **SUBMIT CHANGES**.



07 Optional: On the **Upload Supporting Documents** page, select **+UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.



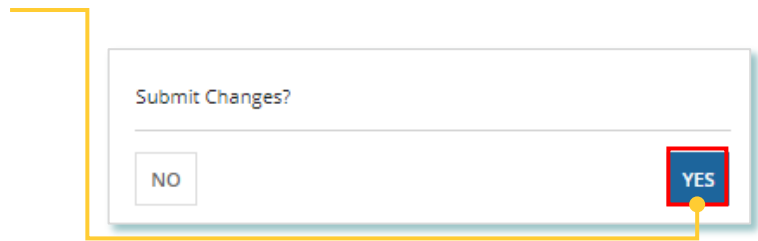
You can upload additional documents or select **NEXT >**.

Note: If there have been any material changes to your Contract(s) information (e.g. an address update), you might be required to submit certain documentation as evidence of the change.

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

If you didn't make any changes, select **VERIFY NO CHANGES**.

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



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

Verification Request Tasks

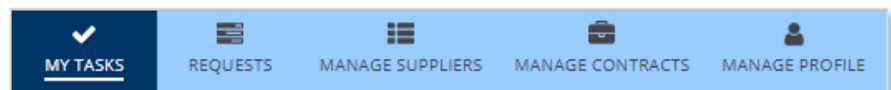
Reviewing Requests Submitted by a Supplier Approver

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

01 Select the **My Tasks** tab.

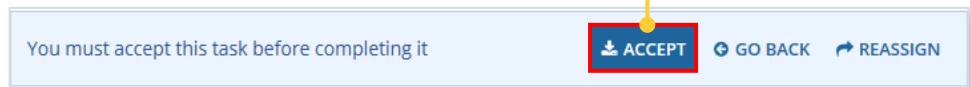


02 Select the **Active Task** for the Request that you want to review.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
53174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

This brings you to the **Review** page.

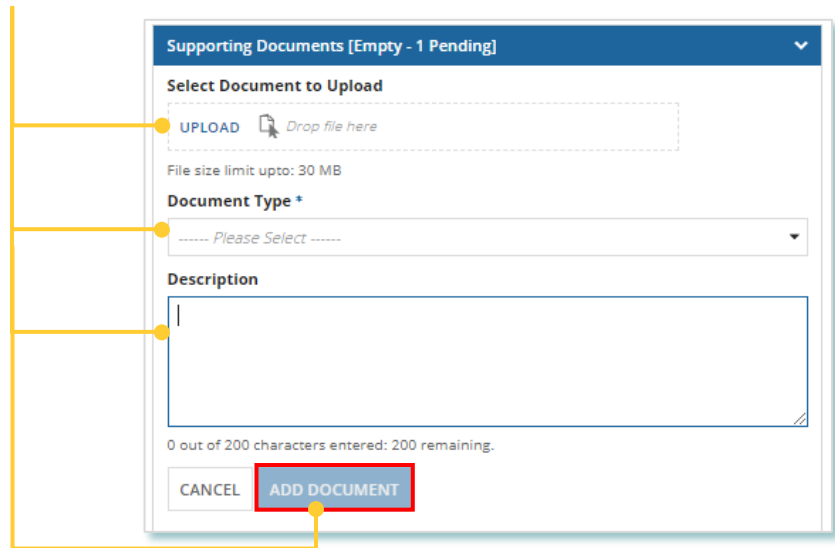
03 To begin working on the task, select **ACCEPT**.



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

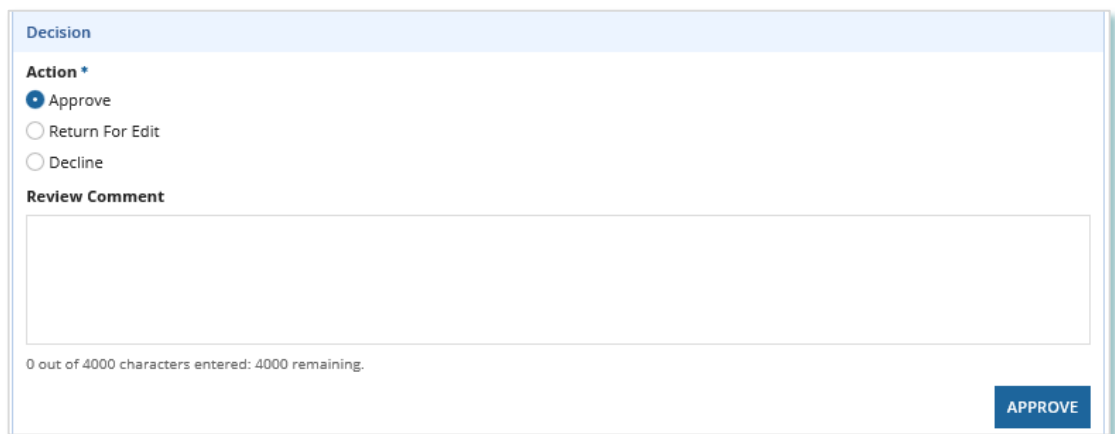
05 **Optional:** To upload supporting documents, select **+UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.



06 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**.



07 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.

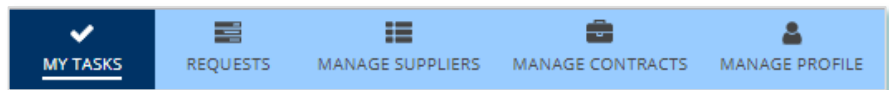
Providing Clarification for Returned Requests

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

- 01** Select the **My Tasks** tab.



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

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
53170	Change to Supplier Legal Name	IESO Review	Supplier	Review Returned Change Request	<input checked="" type="checkbox"/>

Source	Active Task	Status
Supplier	Review - Supplier Rejected Request	<input checked="" type="checkbox"/>

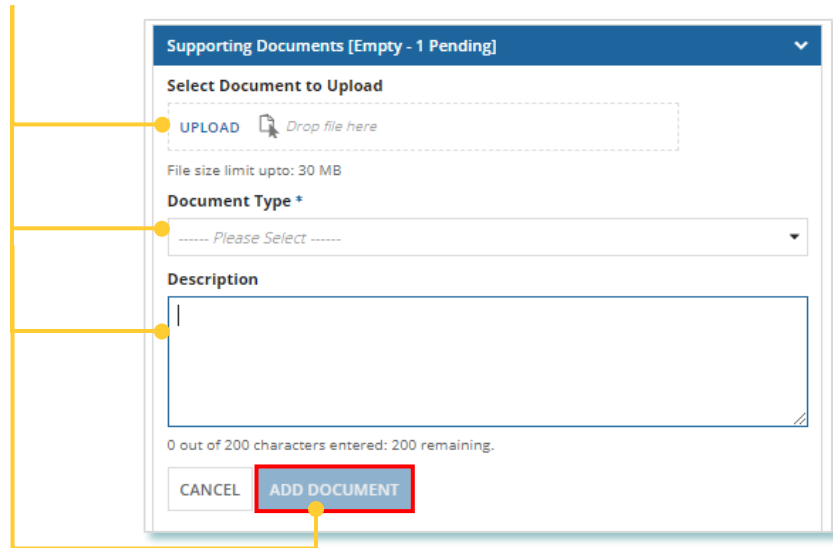
A yellow line connects the 'Review Returned Change Request' cell in the first table to the 'Review - Supplier Rejected Request' cell in the second table.

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

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

05 **Optional:** To upload supporting documents, select **+UPLOAD NEW DOCUMENT**.

Attach a document, choose a document type, enter a description, and then select **ADD DOCUMENT**.



You can upload additional documents or select **NEXT >**.

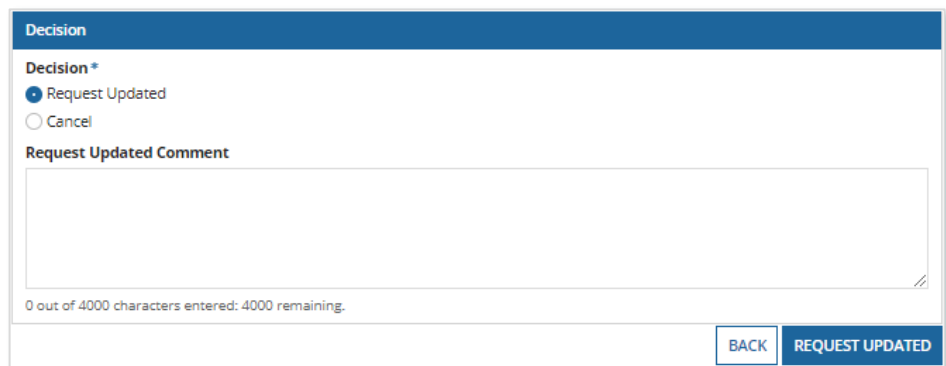
Note: When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

06 Review the changes summarized on the **Review** page.

07 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**.



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

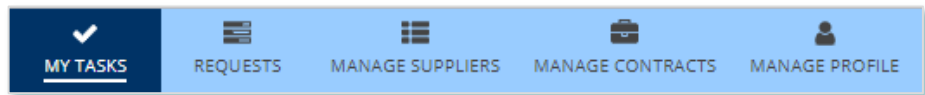
Providing Acknowledgement of a Request Outcome

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

01 Select the **My Tasks** tab.



02 Select the **Provide Acknowledgement** task.

Request ID	Request Type	Status	Source	Active Task	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	Provide Acknowledgement	<input type="checkbox"/>

This brings you to the **Pending Acknowledgement** page.

Personalized messages from the IESO will appear here.

Request S3370 Declined - Please Acknowledge

Submitted
IESO Review
Pending Acknowledgement
Closed

Close Request - Closed

Time	Performed By	Role	Reason
Aug 14, 2019 01:56 PM EST	SYSTEM - AUTO	IESO	

Comment
< No Comment >

Request - Change to Supplier HST-GST Status/Number

Notification to Supplier [Change to Supplier HST-GST Status/Number]

Dear John Smith,

The Change to Supplier HST-GST Status/Number (Request ID #53370) submitted for the subject microFIT Contract has been Declined 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 microFIT Supplier Account or email as required.

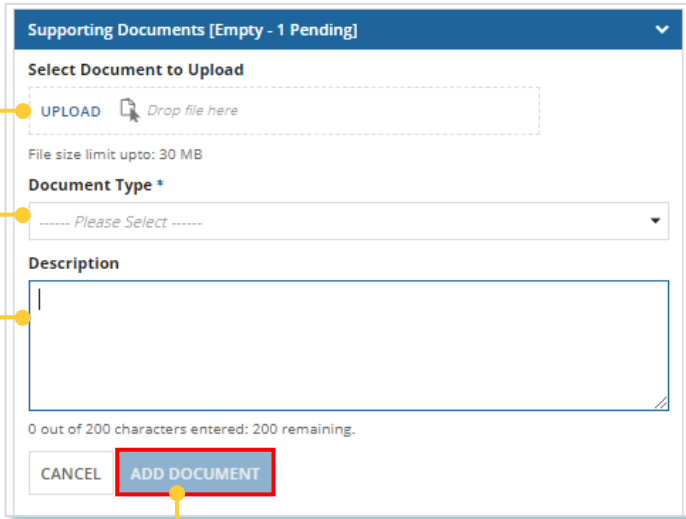
Regards,

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

04 Optional: To upload supporting documents, select +UPLOAD NEW DOCUMENT.


Attach a document, choose a document type, enter a description, and then select

ADD DOCUMENT



Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD  Drop file here

File size limit upto: 30 MB

Document Type *

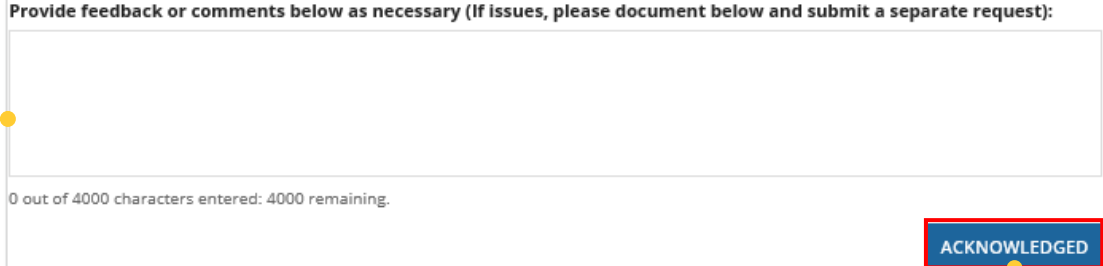
----- Please Select -----

Description

0 out of 200 characters entered: 200 remaining.

CANCEL **ADD DOCUMENT**

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



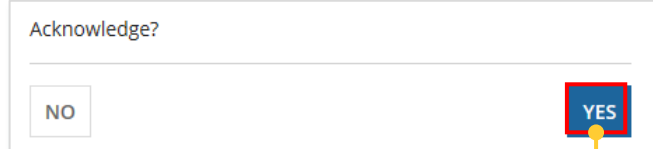
Provide feedback or comments below as necessary (If issues, please document below and submit a separate request):

0 out of 4000 characters entered: 4000 remaining.

ACKNOWLEDGED

06 Select **ACKNOWLEDGED**.

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



Acknowledge?

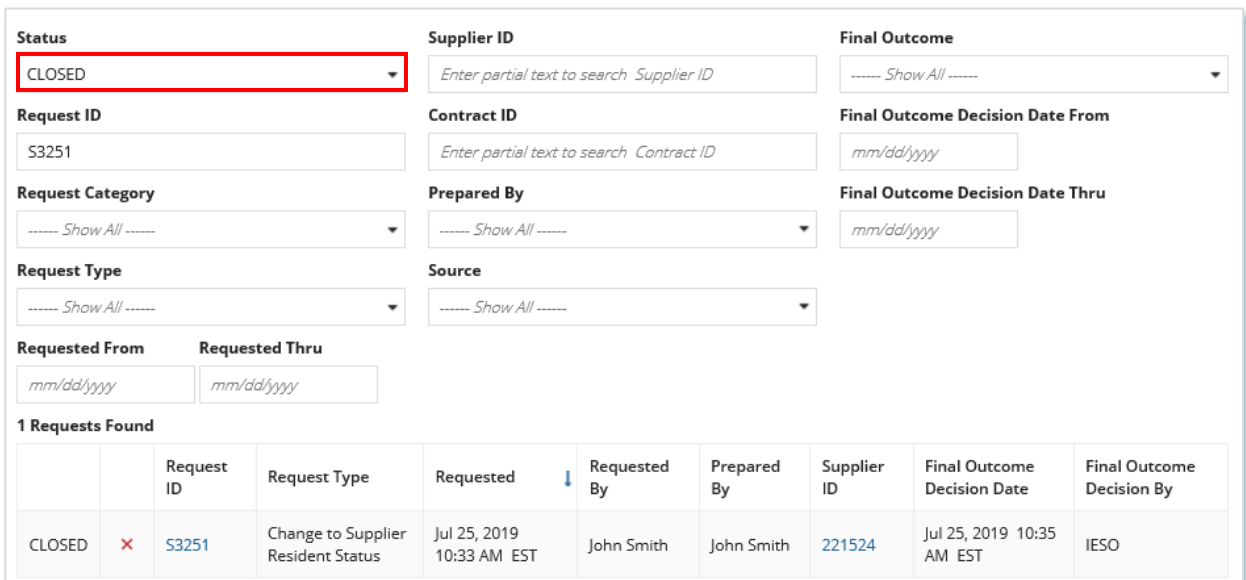
NO **YES**

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

- 01** Select the **Requests** tab.
- 02** In the **Request Search** section, change **Status** to **CLOSED**.
- 03** **Optional:** Use the other filters to search for the Request record you want to view.



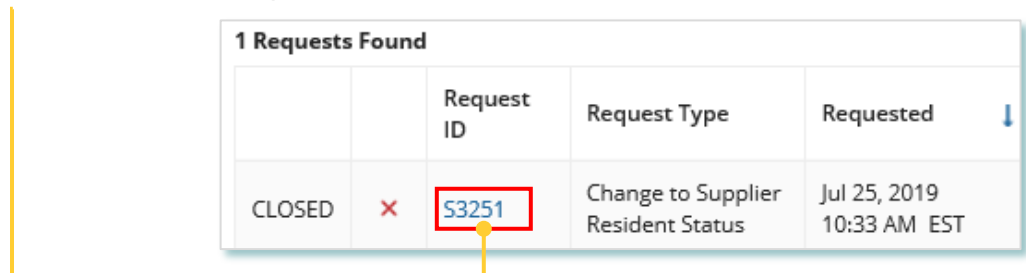
The screenshot shows the Request Search interface with the following filters and results:

- Status:** CLOSED (highlighted with a red box)
- Request ID:** S3251
- Request Category:** ----- Show All -----
- Request Type:** ----- Show All -----
- Requested From:** mm/dd/yyyy
- Requested Thru:** mm/dd/yyyy
- Supplier ID:** Enter partial text to search Supplier ID
- Contract ID:** Enter partial text to search Contract ID
- Prepared By:** ----- Show All -----
- Source:** ----- Show All -----
- Final Outcome:** ----- Show All -----
- Final Outcome Decision Date From:** mm/dd/yyyy
- Final Outcome Decision Date Thru:** 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

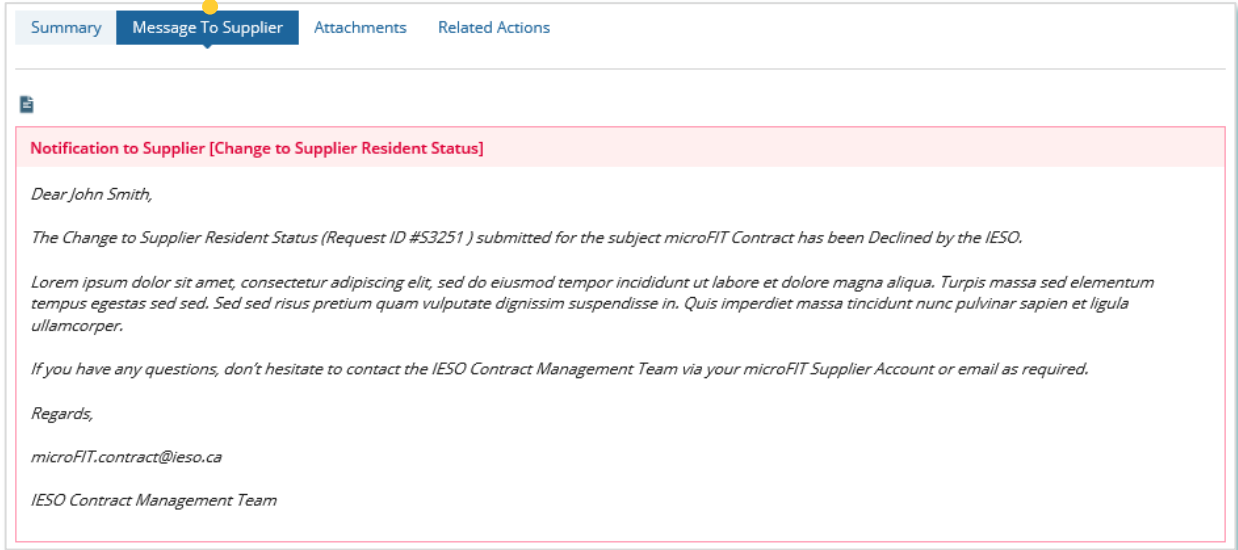
- 04** Select the **Request ID** to view the Request Record.



The close-up screenshot shows the following table:

1 Requests Found				
		Request ID	Request Type	Requested
CLOSED	×	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST

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



Summary **Message To Supplier** Attachments Related Actions

Notification to Supplier [Change to Supplier Resident Status]

Dear John Smith,

The Change to Supplier Resident Status (Request ID #53251) 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.

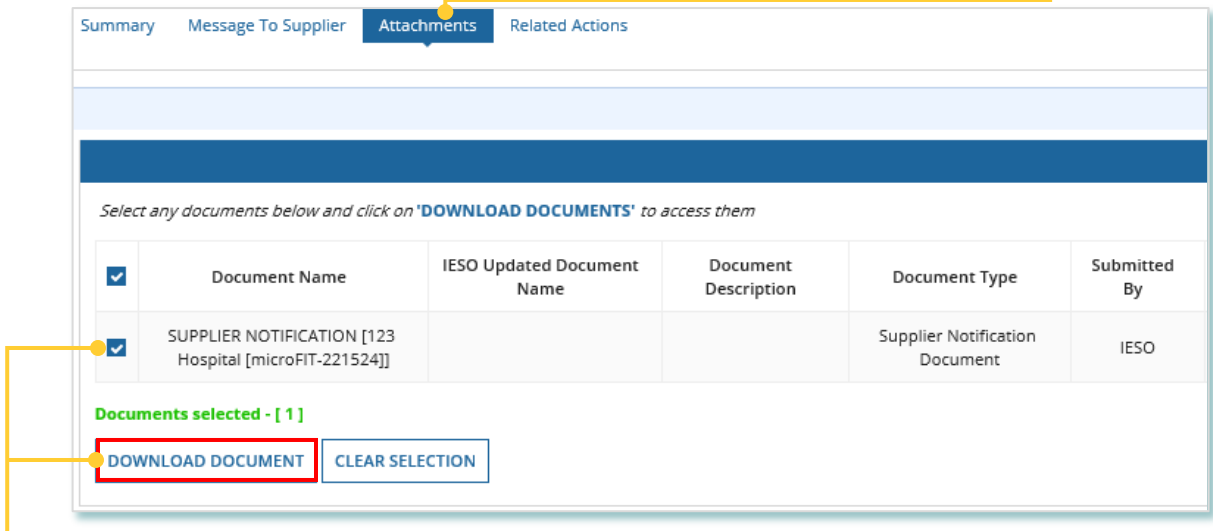
If you have any questions, don't hesitate to contact the IESO Contract Management Team via your microFIT Supplier Account or email as required.

Regards,

microFIT.contract@ieso.ca

IESO Contract Management Team

06 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

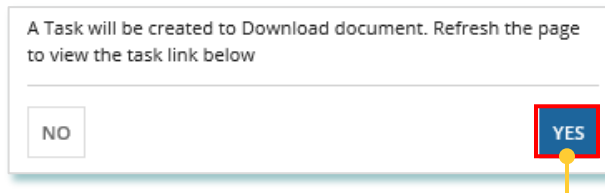
<input checked="" type="checkbox"/>	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By
<input checked="" type="checkbox"/>	SUPPLIER NOTIFICATION [123 Hospital [microFIT-221524]]			Supplier Notification Document	IESO

Documents selected - [1]

DOWNLOAD DOCUMENT CLEAR SELECTION

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


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



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

09 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
CM -microFIT - 221524 - Change to Supplier - Supplier Notificati- IESO Deploy - 20190725103623 - SUPPLIER NOTIFICATI-221524

DONE

12 Select **DONE**.

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

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

NO

YES

Downloading and Saving Documents

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

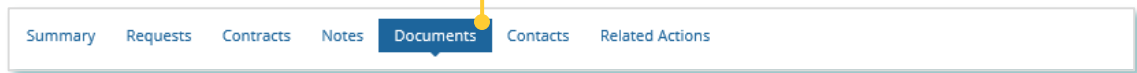
Procedure

- 01** Select the tab that contains the Record you want to view.
To download a Supplier document, select the **Manage Suppliers** tab.
To download a Contract document, select the **Manage Contracts** tab.
To download a Person document, select the **Manage Profile** tab.

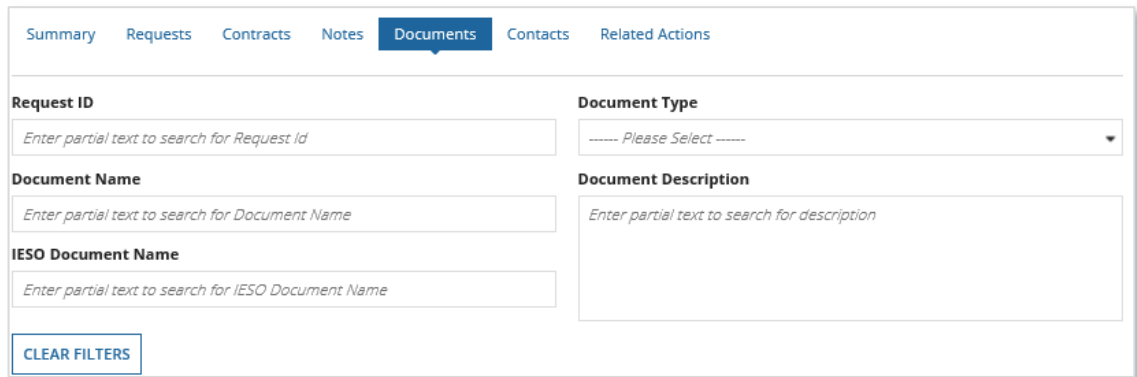
- 02** Select the **ID** for the Record that you want to view.



- 03** Select the **Documents** tab.



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



05 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](#)

06 Select [DOWNLOAD DOCUMENT](#).

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

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

08 Refresh your page.

09 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.

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

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

