



Beacon microFIT Supplier

Digital User Guide
Supplier Management



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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.

Beacon Program Roles

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 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.</p> <p>A Supplier Agent’s actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.</p>

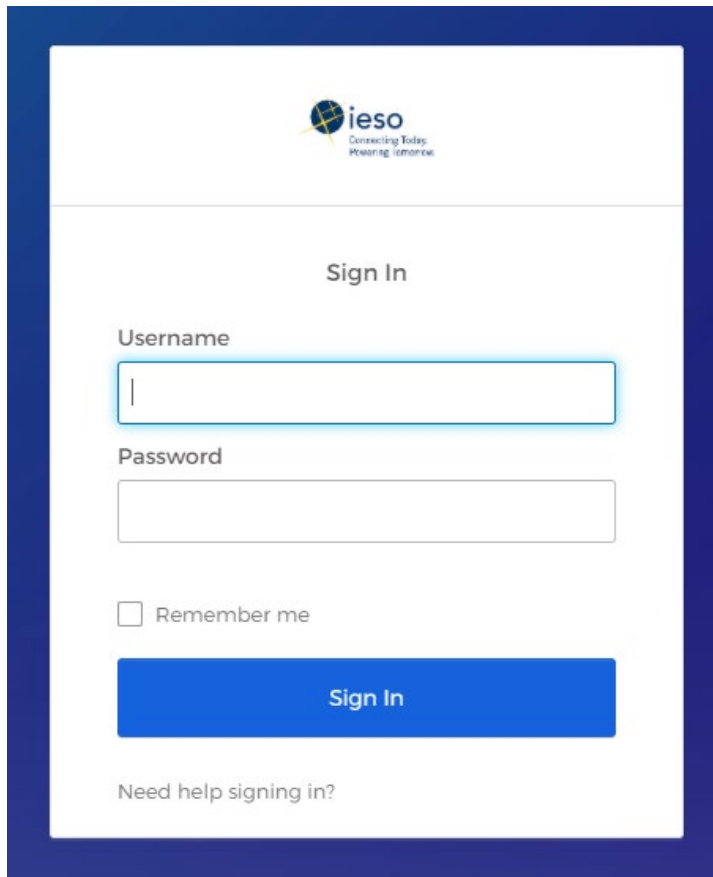
Role	Description
IESO	The IESO is represented by the Contract Management team that reviews, approves and/or rejects requests submitted by the Supplier Approver to the IESO. The IESO can also initiate certain requests that are to be reviewed by the Supplier Approver.


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. Go to <http://www.ieso.ca/Get-Involved/microfit/login>.
2. Enter your account username (your email address) and password. Select "Sign in".

A screenshot of the IESO Sign In page. The page features the IESO logo at the top, which includes a globe icon and the text "ieso Connecting Today. Powering Tomorrow." Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". The "Username" field is highlighted with a blue border. Below the "Password" field is a checkbox labeled "Remember me". At the bottom of the form is a blue button labeled "Sign In". Below the button is a link that says "Need help signing in?".

 **ieso**
Connecting Today.
Powering Tomorrow.

Sign In

Username

Password

Remember me

Sign In

[Need help signing in?](#)

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.

ieso
Connecting Today.
Powering Tomorrow.

SMS

SMS Authentication
(+1 XXX-XXX-XXXX)

Enter Code

Send code

Do not challenge me on this device again

Verify

Back to sign in

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.**

ieso
Connecting Today.
Powering Tomorrow.

?

Security Question

What is the food you least liked as a child?

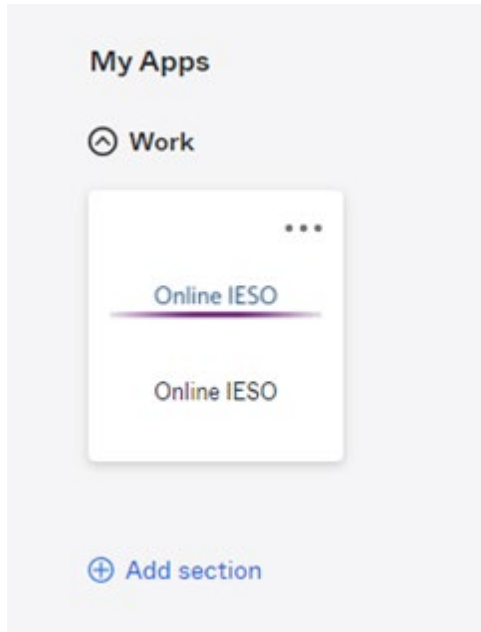
.....|

Do not challenge me on this device again

Verify

Back to sign in

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 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.

New Supplier Registration

Registering a New Supplier

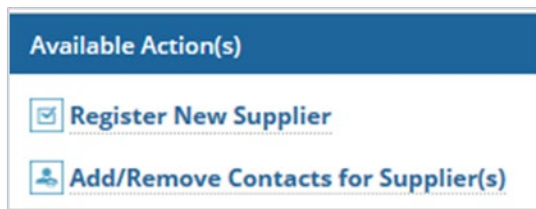
During the lifecycle of your microFIT Contract(s), there might be changes to the ownership of the project. In some instances, you might be required to register a new Supplier. To register a new Supplier, you can submit a Supplier Registration Request. Once a Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete Supplier Registration Request in Beacon.

Procedure

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



2. Select **Register New Supplier**. This brings you to the **Register New Supplier** page.



3. Choose from the **Supplier Type**, **Legal Entity Type**, and **Reason for Registration** menus.

Note: The Supplier Type you choose determines what fields and validations are required during registration for the Supplier entity and Supplier related entities.

4. Enter the information for the new Supplier.
5. Select **NEXT**.

Register New Supplier

About the Supplier

Supplier Type *

Legal Entity Type *

Reason for Registration *

Supplier Legal Name (as it will appear on the Contract) *

Are you a GST/HST Registrant? *
 Yes No

Are you a Non-Resident of Canada? *
 Yes No

- 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

Drop file here

File size limit upto: 30 MB

Document Type *

Description

0 out of 200 characters entered: 200 remaining.

Note: When you register a new Supplier, you might be required to submit certain documentation as evidence of certain Supplier information (e.g. legal entity type, resident status, etc.).

- On the Review page, confirm your information, and then select **SUBMIT REQUEST**. If you didn't make any changes, select **VERIFY NO CHANGES**.

Register New Supplier

Supplier Information Supplier Partners Supporting Documents Review

Registration Summary

Request Type: New Supplier Registration
Requested By: John Smith
Submission Reason: Registering Supplier for a Contract Assignment

Supplier Information

Supplier Legal Name: 123 Joint Venture
Supplier Type: microFIT
Legal Entity Type: Joint Venture - No Legal Personality
GST/HST Registrant? Yes No
Non-Resident of Canada? Yes No

Supplier Partners [1]

Are there any partners?
 Y N

Partner A

Partner Type	Parents?
Partnership	No

Uploaded Attachment(s)

Document	Document Description	Document Type
New-attachment.jpg	Supporting documents for supplier registration	New Supplier Registration Supporting Document
African_Lion.jpg	Supporting documents 2	Other

[CANCEL REQUEST](#) < BACK [SUBMIT REQUEST](#)

8. A dialog box is opened, select **YES**. Once the Request is submitted, a confirmation page is displayed. The Request is now under IESO review. Please wait for further instructions from the IESO.

Submit Changes?

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

Supplier Registration Submitted

Thank you! Your request has been submitted

Request S3387

[Complete Supplier Registration - Submit](#)

Cancelling the Registration of a New Supplier

You can cancel a Supplier Registration Request that you submitted.

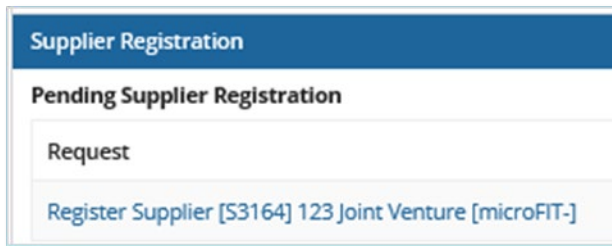
Note: You can cancel a Supplier Registration Request only before the IESO has accepted the Request for review.

Procedure

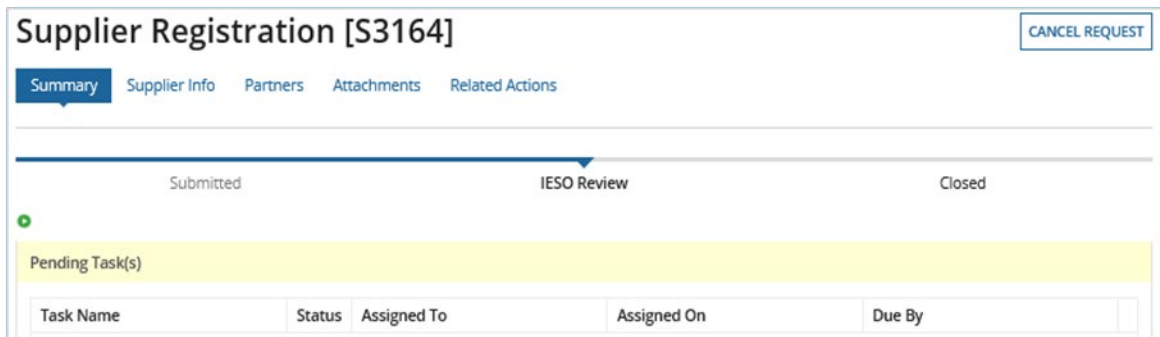
1. Select the **MANAGE SUPPLIERS** tab.



2. Select the pending request that you want to cancel. This brings you to the Request Record for the Supplier registration.




3. Select CANCEL REQUEST.



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

Confirm Cancellation of Request S3164

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

Complete Supplier Registration - Submit

Time	Performed By	Role	Reason
Jul 16, 2019 09:16 AM EST	John Smith	Supplier Requestor	Registering Supplier for a Contract Assignment

Comment
< No Comment >

Request - New Supplier Registration >

Describe Reason for Cancelling Request *

0 out of 4000 characters entered: 4000 remaining.

BACK

CANCEL REQUEST

5. Select **CANCEL REQUEST**.
6. A dialog box will open, select **Yes**.

Are you sure?

NO

YES

7. Refresh your page.
8. The Request status is now **closed** and the outcome is **Cancelled**.

SubmittedIESO ReviewClosed

Close Request - Closed

Time	Performed By	Role	Reason
Jul 16, 2019 09:21 AM EST	SYSTEM - AUTO	IESO	

Comment
< No Comment >

Request - New Supplier Registration

Request ID: S3164

Request Type: New Supplier Registration

Requested On: Jul 16, 2019 09:16 AM EST

Requested By: John Smith

Submission Reason: Registering Supplier for a Contract Assignment

Supplier: 123 Joint Venture

Supplier ID: 316856

Supplier Type: microFIT



Legal Entity Type: Joint Venture - No Legal Personality

Outcome: Cancelled

Reviewed On: Jul 16, 2019 09:21 AM EST

Completed On: Jul 16, 2019 09:21 AM EST

Task History

- >  Close Request - Closed
- >  Cancel Request - Cancel

Supplier Overview

Manage Suppliers Page

After the Supplier Registration process is complete, you'll see all of your Suppliers on the **MANAGE SUPPLIERS** page.

You can search for Suppliers by using these filters

To register a new Supplier, select **Register New Supplier**.

To add or remove Contacts from Supplier(s), select **Add/Remove Contacts for Supplier(s)**.

The screenshot shows the 'MANAGE SUPPLIERS' page with a navigation bar at the top containing 'MY TASKS', 'REQUESTS', 'MANAGE SUPPLIERS', 'MANAGE CONTRACTS', and 'MANAGE PROFILE'. Below the navigation bar is an 'Available Action(s)' section with two options: 'Register New Supplier' and 'Add/Remove Contacts for Supplier(s)'. Underneath is the 'My Suppliers' section, which includes search filters for 'Supplier Type', 'Supplier Legal Name', 'Locked By', and 'Supplier ID'. A 'Paging: 10|25|50|Show All' option is also present. At the bottom is a table with columns for 'Supplier ID', 'Supplier Legal Name', 'Legal Entity Type', and 'Supplier Type'. A callout bubble highlights the 'Supplier ID' column header, and another callout bubble highlights the 'Supplier ID' cell in the first row of the table.



To see a Supplier Record, select the **Supplier ID**.

To see the status of the Supplier, hover over the icon.

Select any header to sort your Suppliers by those criteria.

Supplier Record Overview

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

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

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

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

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

Supplier: ABC Joint Venture [531340]

- Summary
- Partners
- Requests
- Contracts
- Notes
- Documents
- Contacts
- Related Actions

RECORD LOCKED

Request ID	Request Type	Date Requested	Requested By
<input type="checkbox"/> S3170	Change to Supplier Legal Name	Jul 16, 2019 09:44 AM EST	John Smith

Supplier Information

Supplier Legal Name: ABC Joint Venture
Supplier Id: 531340
Supplier Type: microFIT
Legal Entity Type: Joint Venture - No Legal Personality
GST/HST Registrant? Yes No
Non-Resident of Canada? Yes No

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

Managing Supplier Requests

Submitting a Request to Change a Supplier Record

To update the Record information for a Supplier, you can submit a Change to Supplier Request. You can submit a Supplier Request for the following actions:

- Change to Supplier HST-GST Status/Number
- Change to Supplier Legal Name
- Change to Supplier Resident Status
- Other

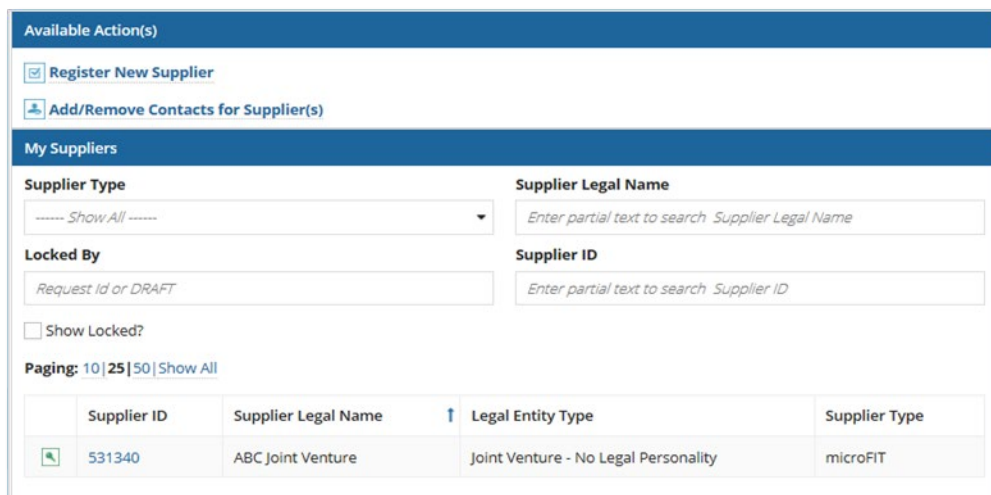
Once a Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Supplier Request in Beacon.

Procedure

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

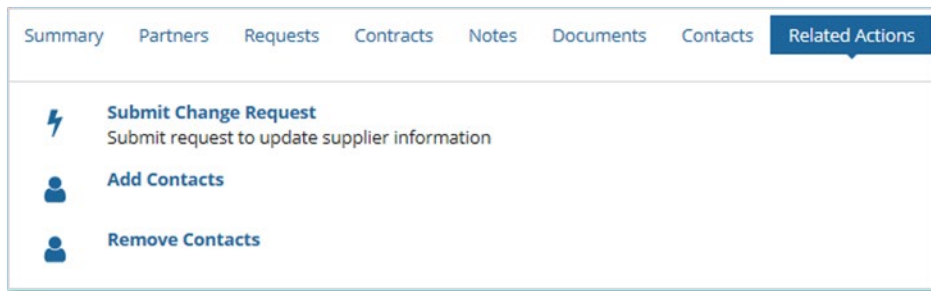


2. **Optional:** Use the filters to search for the Supplier that you want to change.
3. Select the **Supplier ID** for the Supplier that you want to change.

A screenshot of the 'My Suppliers' interface. It features a search section with filters for 'Supplier Type' (a dropdown menu), 'Supplier Legal Name' (a text input field), 'Locked By' (a text input field), and 'Supplier ID' (a text input field). Below the filters is a 'Paging' section with options '10 | 25 | 50 | Show All'. At the bottom is a table with columns: 'Supplier ID', 'Supplier Legal Name', 'Legal Entity Type', and 'Supplier Type'.

Supplier ID	Supplier Legal Name	Legal Entity Type	Supplier Type
531340	ABC Joint Venture	Joint Venture - No Legal Personality	microFIT

4. Select **Related Actions > Submit Change Request**.



5. On the **Submit Change Request** page, choose what type of Request you want to submit.

Note: Different entity types will have different change Requests to select from.

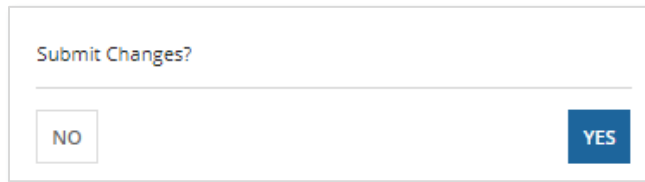
6. Choose a reason for submitting the change, enter a description for your Request, and then select **NEXT**.

7. A dialog box will open, select **CONTINUE**.
8. On the **Supplier Information page**, make the updates to the Supplier information, and then select **NEXT**.
9. **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 submit a Supplier Change Request, you might be required to submit certain documentation as evidence of certain information (e.g. legal entity type, resident status, etc.).

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

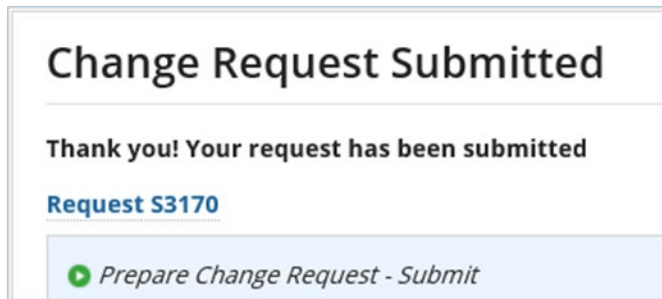
11. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.



Submit Changes?

NO YES


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



Change Request Submitted

Thank you! Your request has been submitted

Request S3170

 *Prepare Change Request - Submit*

Adding or Removing Contacts from Suppliers or Contracts

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

The following instructions will guide you through how to Add and/or Remove Contacts from Supplier(s) in Beacon. For instructions on how to Add and/or Remove Contacts from a Contract, please refer to the Contract Management user guide document.

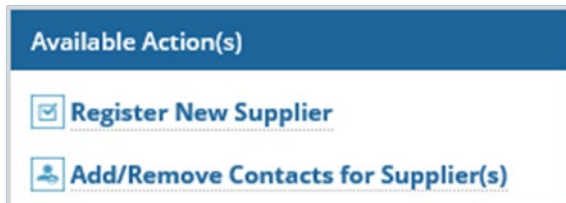
Adding Supplier Contacts to Suppliers

Procedure

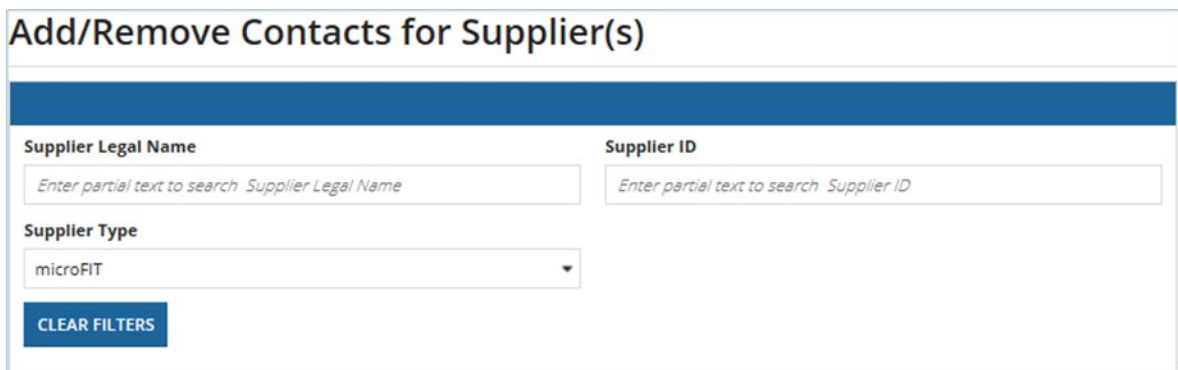
1. Select the **MANAGE SUPPLIERS** tab.



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.

A screenshot of the 'Add/Remove Contacts for Supplier(s)' page. The page has a dark blue header with the title 'Add/Remove Contacts for Supplier(s)'. Below the header, there are two search input fields: 'Supplier Legal Name' and 'Supplier ID', both with placeholder text 'Enter partial text to search Supplier Legal Name' and 'Enter partial text to search Supplier ID'. Below these fields is a 'Supplier Type' dropdown menu with 'microFIT' selected. At the bottom left, there 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 checked="" type="checkbox"/>	Supplier Id	Supplier Legal Name	Supplier Type	Legal Entity Type
<input checked="" type="checkbox"/>	221524	123 Hospital	microFIT	Hospital
<input checked="" type="checkbox"/>	531340	ABC Joint Venture	microFIT	Joint Venture - No Legal Personality

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.

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

Search Contacts

Person Id **Email Address**

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

- Choose a Role.

Selected Contacts - [1]

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

Supplier Agent
Supplier Approver

- 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-MBBBBBBB	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 -----

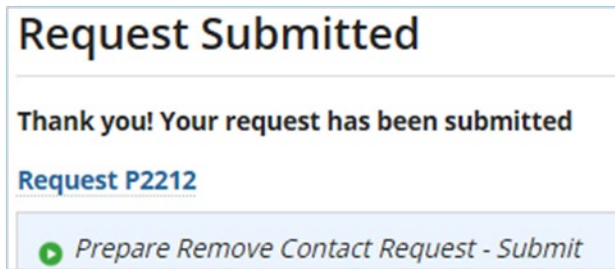
Description

0 out of 200 characters entered: 200 remaining.

CANCEL **ADD DOCUMENT**

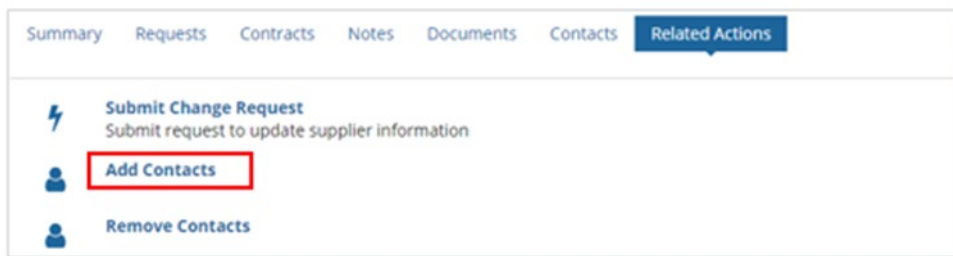
Note: When you add additional Contacts to Suppliers or Contracts, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, director's register, etc.).

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**.



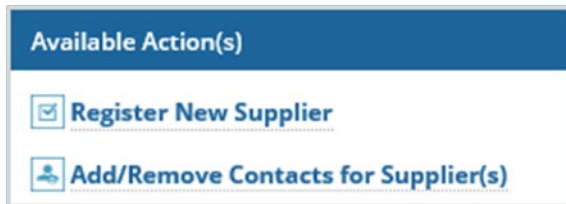
Removing Supplier Contacts from Suppliers

Procedure

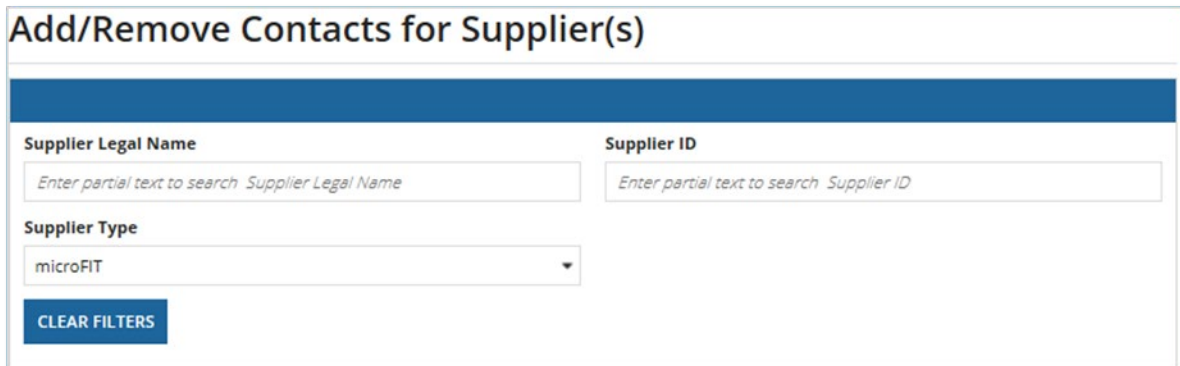
1. Select the **MANAGE SUPPLIERS** Suppliers tab.



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 page title is 'Add/Remove Contacts for Supplier(s)'. Below the title is a blue header bar. The main content area contains two search fields: 'Supplier Legal Name' and 'Supplier ID', both 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. A blue 'CLEAR FILTERS' button is located at the bottom left of the filter section.

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 checked="" type="checkbox"/>	Supplier Id	Supplier Legal Name	Supplier Type	Legal Entity Type
<input checked="" type="checkbox"/>	221524	123 Hospital	microFIT	Hospital
<input checked="" type="checkbox"/>	531340	ABC Joint Venture	microFIT	Joint Venture - No Legal Personality

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?

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 certain 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?

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**.

Summary Requests Contracts Notes Documents Contacts **Related Actions**

-  **Submit Change Request**
Submit request to update supplier information
-  **Add Contacts**
-  **Remove Contacts**

Supplier Request Tasks

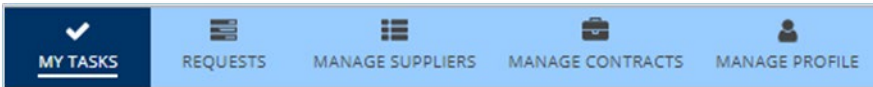
Reviewing Requests Submitted by a Supplier Approver

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

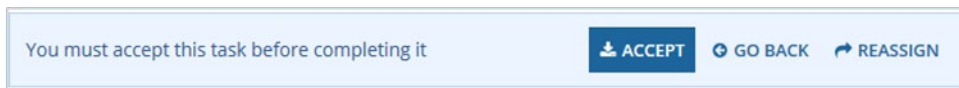
1. Select the **MY TASKS** tab.



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

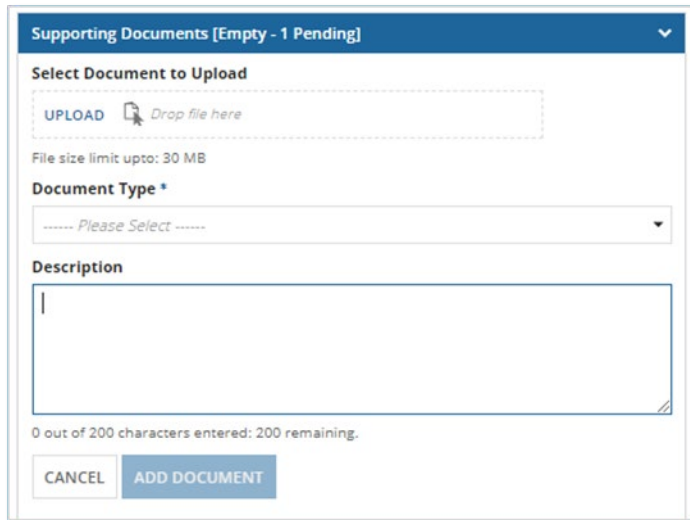
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

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



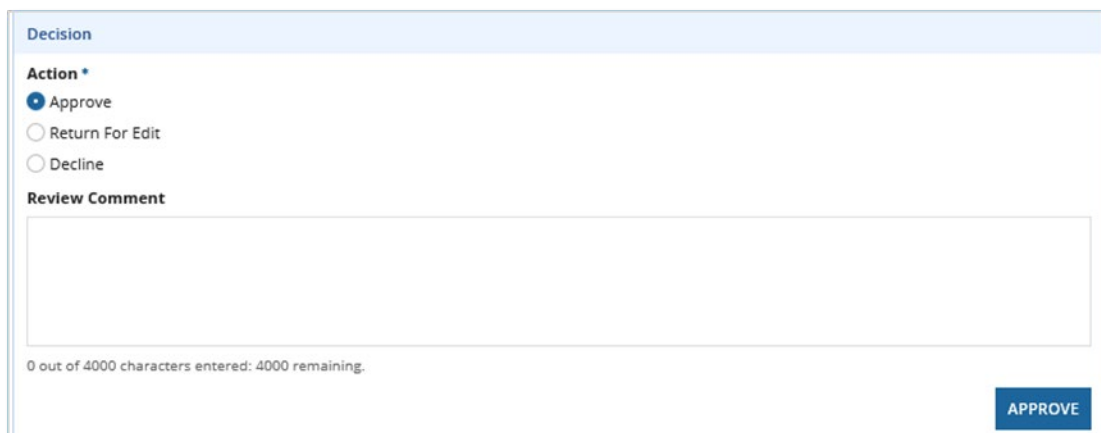
4. Review the values entered and the documents in the Request

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



The screenshot shows a dialog box titled "Supporting Documents [Empty - 1 Pending]". It contains 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" is selected from a dropdown menu currently 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 dialog are "CANCEL" and "ADD DOCUMENT" buttons.

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



The screenshot shows a "Decision" form. It has a section for "Action" with three radio button options: "Approve" (which is selected), "Return For Edit", and "Decline". Below this is a "Review Comment" text area. At the bottom left, it says "0 out of 4000 characters entered: 4000 remaining." A blue "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.

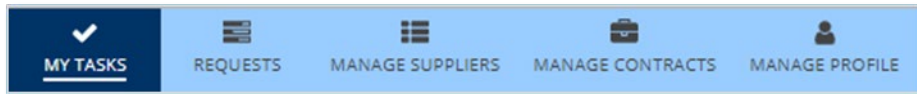
Providing Clarification for Returned Requests

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

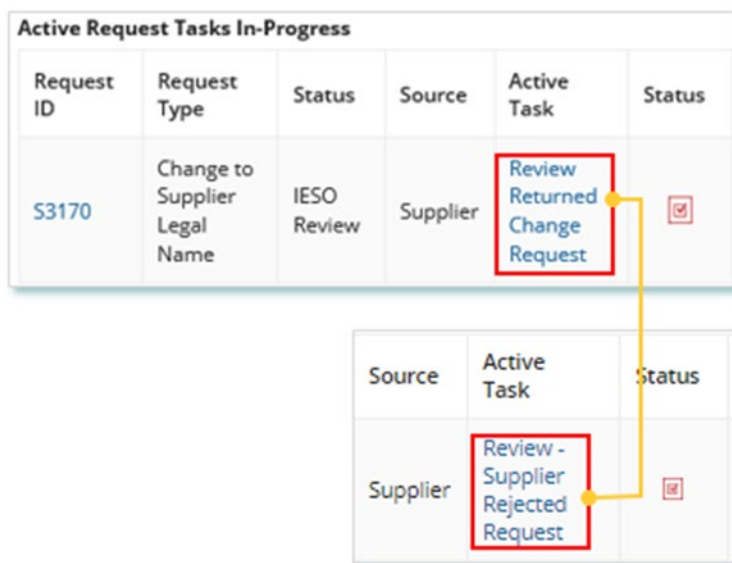
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



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



The image shows a table titled 'Active Request Tasks In-Progress'. The table has six columns: Request ID, Request Type, Status, Source, Active Task, and Status. A red box highlights the 'Active Task' cell for the first row, which contains the text 'Review Returned Change Request'. A yellow arrow points from this cell to a second, smaller table below it. This second table has three columns: Source, Active Task, and Status. A red box highlights the 'Active Task' cell in this second table, which contains the text 'Review - Supplier Rejected Request'. A red checkmark icon is visible in the 'Status' column of both tables.

Request ID	Request Type	Status	Source	Active Task	Status
S3170	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"/>

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

The screenshot shows a dialog box titled "Decision". It contains two radio buttons: "Request Updated" (which is selected) and "Cancel". Below the radio buttons 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".

additional context for why you cancelled the Request, and then select **Cancel**.

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

The screenshot shows a dialog box titled "Acknowledge?". It has a horizontal line for a response. At the bottom left, there is a "NO" button, and at the bottom right, there is a "YES" button.

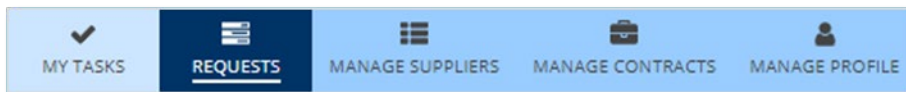
Canceling a Submitted Request

You can cancel a Request that you submitted.

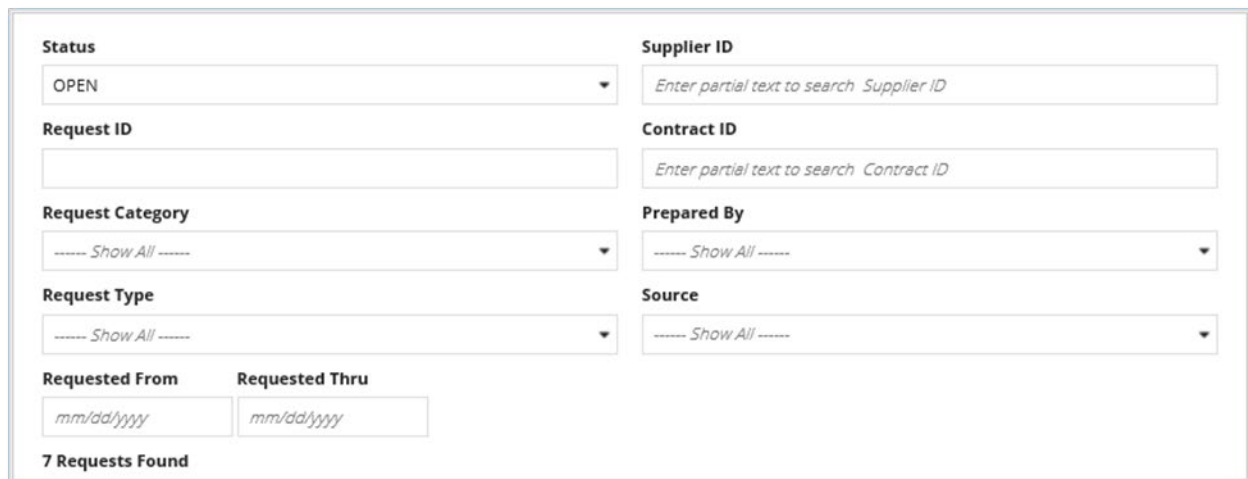
Note: You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

1. Select the **Requests** tab.



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

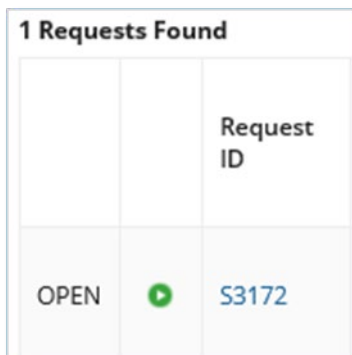



The image shows a filter interface with the following fields:

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

7 Requests Found

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



1 Requests Found		
		Request ID
OPEN		S3172

4. Select **CANCEL REQUEST**.

Supplier Request [S3172] CANCEL REQUEST

Summary Attachments Related Actions

Submitted IESO Review Closed

OPEN

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".

Submitted

IESO Review

Closed

CLOSED



Close Request - Closed

Time	Performed By	Role	Reason
Jul 16, 2019 10:30 AM EST	SYSTEM - AUTO	IESO	

Comment

< No Comment >

Request - Change to Supplier Legal Name

Request ID: S3172	Supplier: ABC Joint Venture	Outcome: Cancelled
Request Type: Change to Supplier Legal Name	Supplier ID: 531340	Reviewed On: Jul 16, 2019 10:30 AM EST
Requested On: Jul 16, 2019 10:27 AM EST	Supplier Type: microFIT	Completed On: Jul 16, 2019 10:30 AM EST
Requested By: John Smith	Legal Entity Type: Joint Venture - No Legal Personality	
Submission Reason: Changing the Legal Name of the Supplier		
Submission Explanation: Updating legal name		

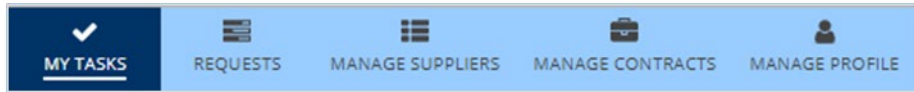
Providing Acknowledgement of a Request Outcome

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

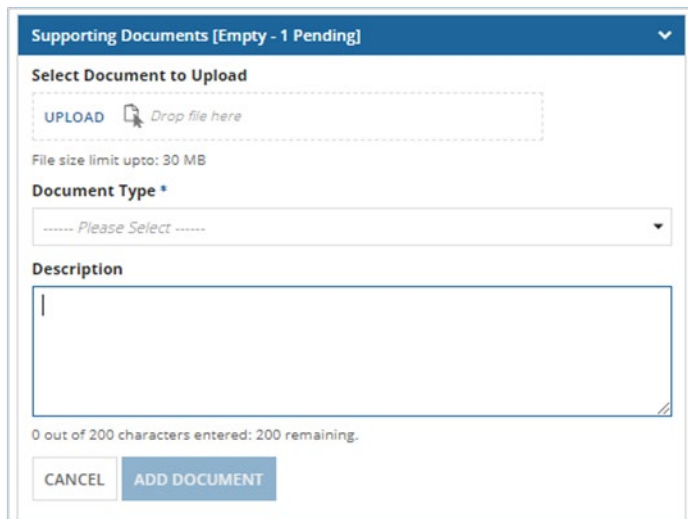
1. Select the **MY TASKS** tab.



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	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	Provide Acknowledgement	

3. Review the information and any documents added by other users.
4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

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' area. Below this is a 'File size limit upto: 30 MB' note, a 'Document Type *' dropdown menu (currently showing 'Please Select'), and a 'Description' text area. At the bottom, it shows '0 out of 200 characters entered: 200 remaining.' and 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.

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.

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

Acknowledge?

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 S3251	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	

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

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.

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

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
<input checked="" type="checkbox"/>	SUPPLIER NOTIFICATION [123 Hospital [microFIT-221524]]			Supplier Notification Document	IESO

Documents selected - [1]

[DOWNLOAD DOCUMENT](#) [CLEAR SELECTION](#)


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
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?

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	<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**.

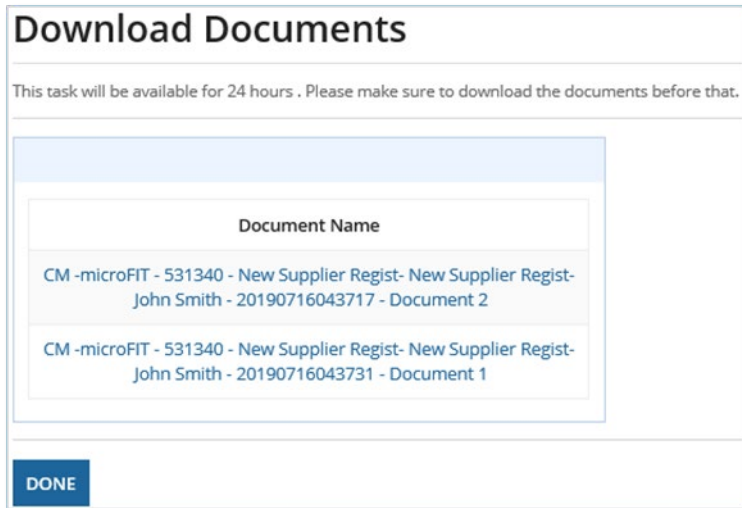
Download Documents

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

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

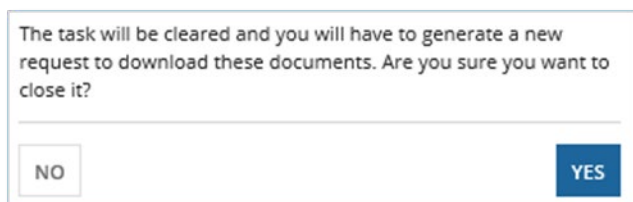
10. To begin saving documents, select the document name for the document(s) that you want to download.

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



11. Select DONE.

12. A dialog box is opened, select Yes.



Additional Resources

Additional resources can be found at the following links:

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

**Independent Electricity
System Operator**

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Toronto, Ontario M5H 1T1

E-mail: microFIT.contract@ieso.ca

ieso.ca

 [@IESO_Tweets](https://twitter.com/IESO_Tweets)

 facebook.com/OntarioIESO

 linkedin.com/company/IESO