Beacon FIT Supplier

Digital User Guide
Contract Management

Connecting Today.
Powering Tomorrow.

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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	The Supplier Approver is the FIT Contract counterparty or an individual who has the authority to act on behalf of the Supplier (i.e. a director or executive of a corporation, estate trustee, etc.). References to "you" and "your" throughout this user guide are references to a Supplier Approver. **Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the FIT Contract.**
Supplier Agent	The Supplier Agent is an *optional* role assigned by the Supplier Approver in relation to a FIT Contract. When assigned to a FIT Contract, a Supplier Agent can view the FIT Contract and related information and prepare certain types of requests for review and approval by a Supplier Approver. **A Supplier Agent's actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.**

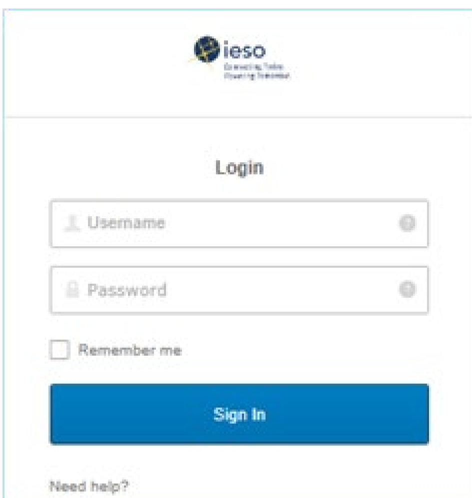
Role	Description
IESO CM FIT Analyst	The IESO CM FIT Senior Analyst is responsible for regular review and processing of requests submitted by the Supplier Approver to the IESO. The IESO CM FIT Senior Analyst can also initiate certain requests that are to be reviewed by the Supplier Approver.
IESO CM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

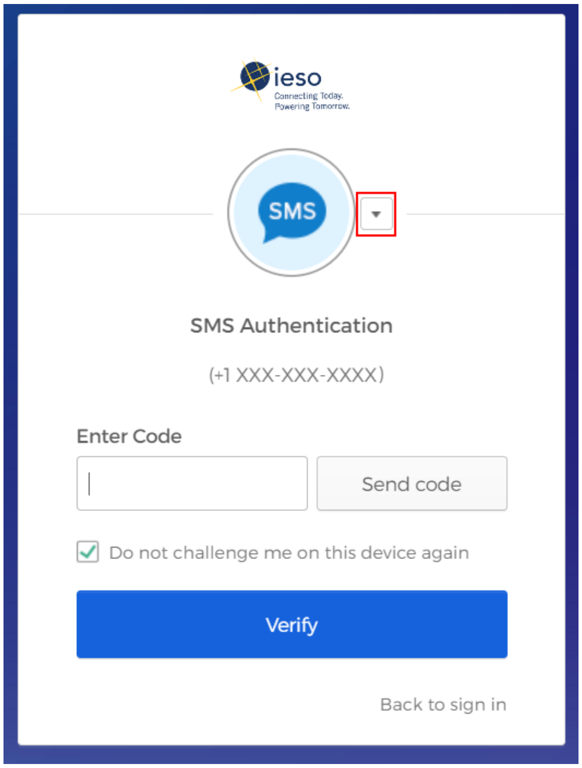
Procedure

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.

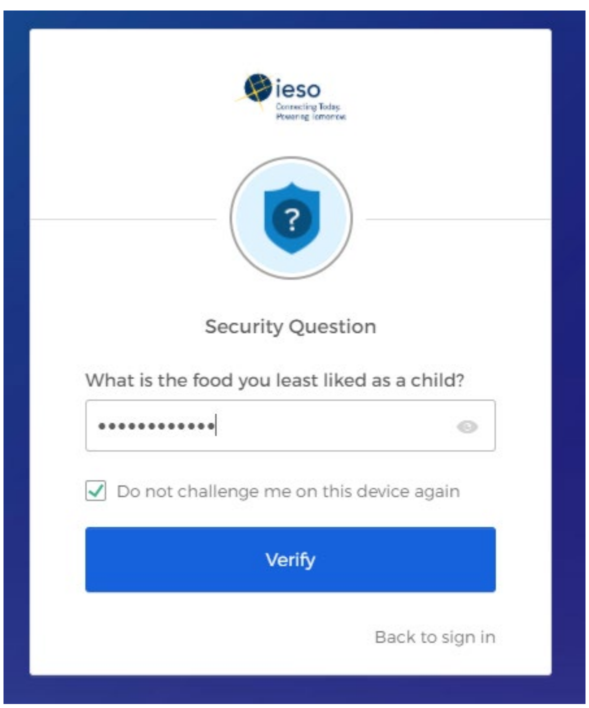


3. Select **Sign In**.

4. 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.



5. 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.**



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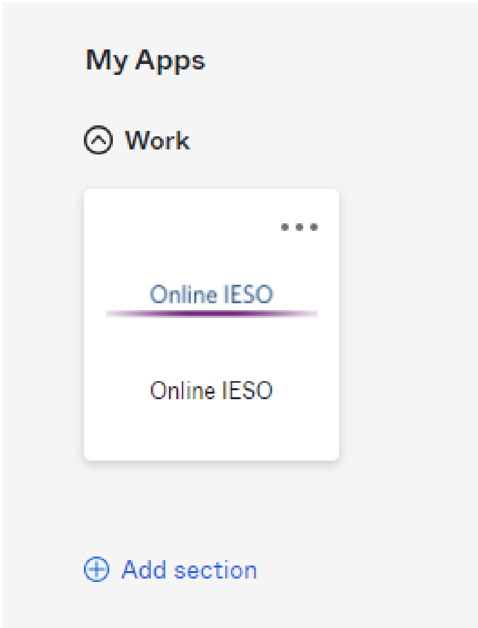
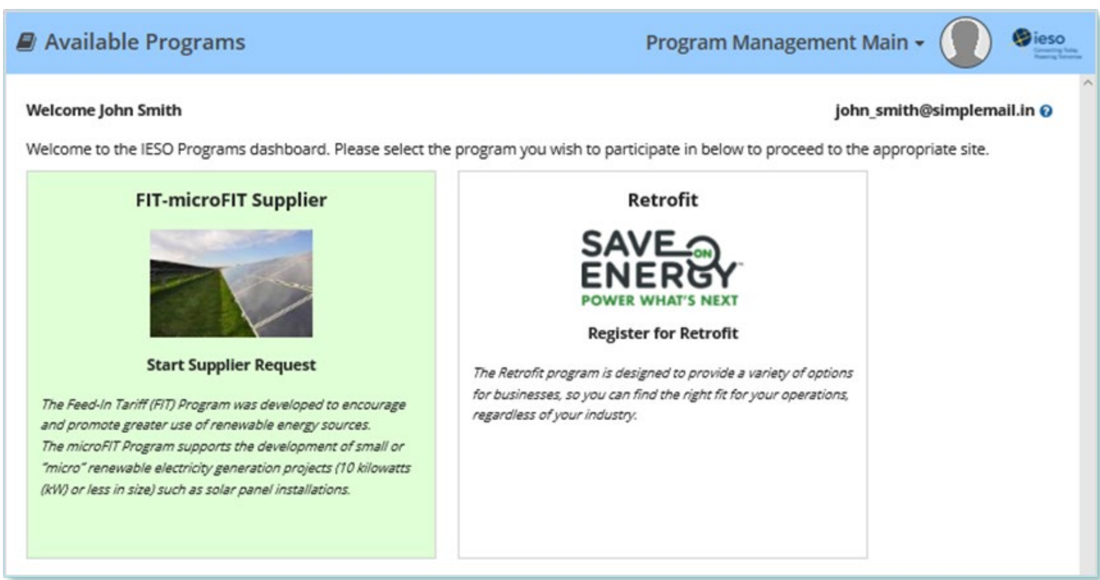
6. On your My Apps Dashboard, select the tile that says "Online IESO"



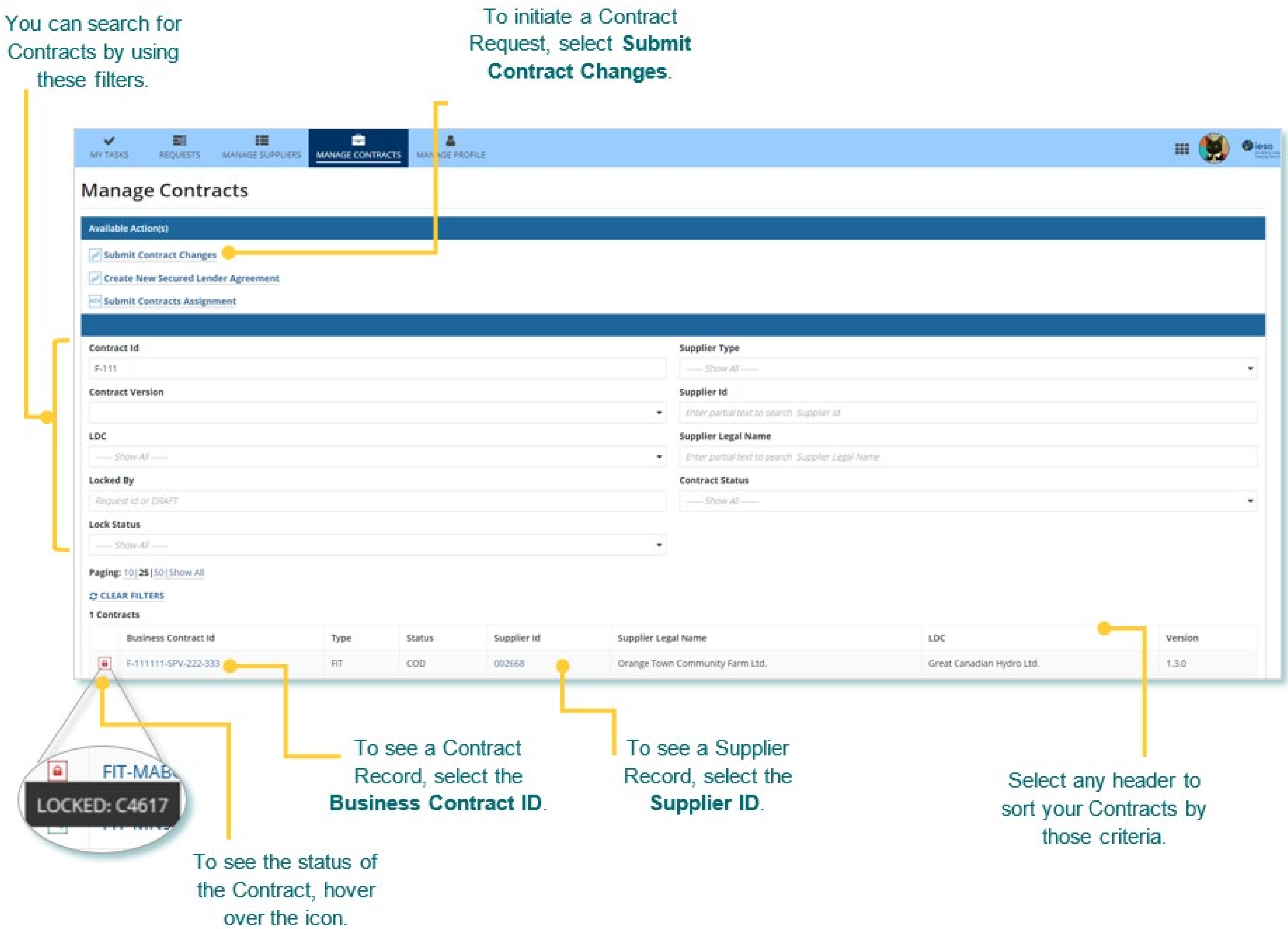
7. Next you will be brought to the Available Programs Dashboard. Select the FIT-microFIT Supplier program tile. This will then bring you to the **MY TASKS** page in Beacon.



Contract Overview

Manage Contracts Page

On the **MANAGE CONTRACTS** page you'll see all of your Contracts.



Contract Record Overview

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

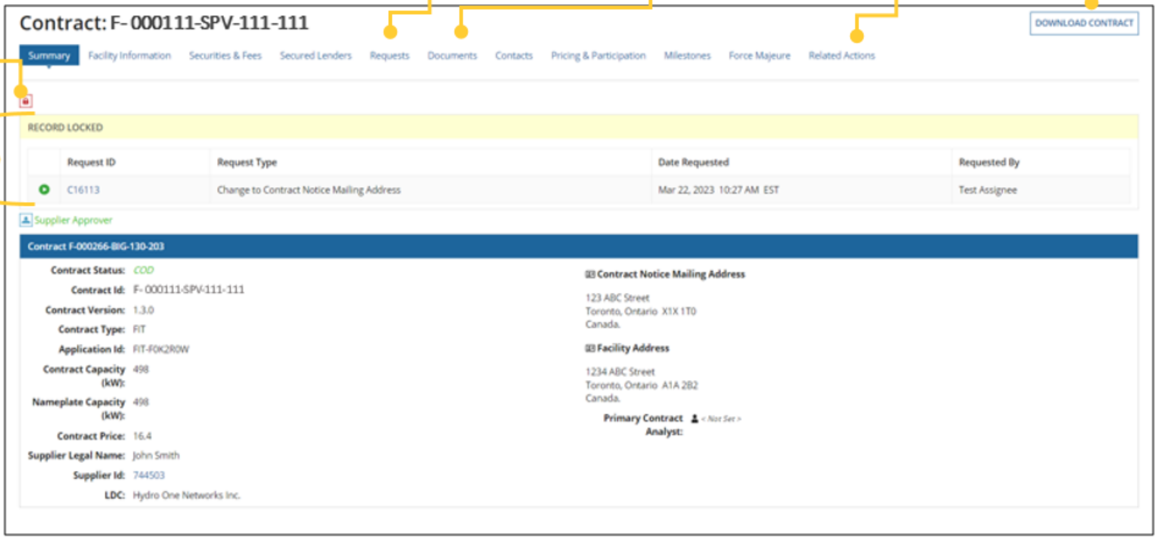
If there is an active Request or a draft related to a Contract, the Record will be locked.

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

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

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

To download your contract, select the **Download Contract** tab.

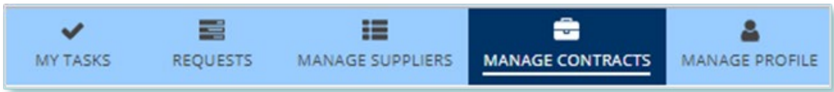


The **Record Locked** table shows information about the Request that is locking the Contract. For more details, select the **Request ID**.

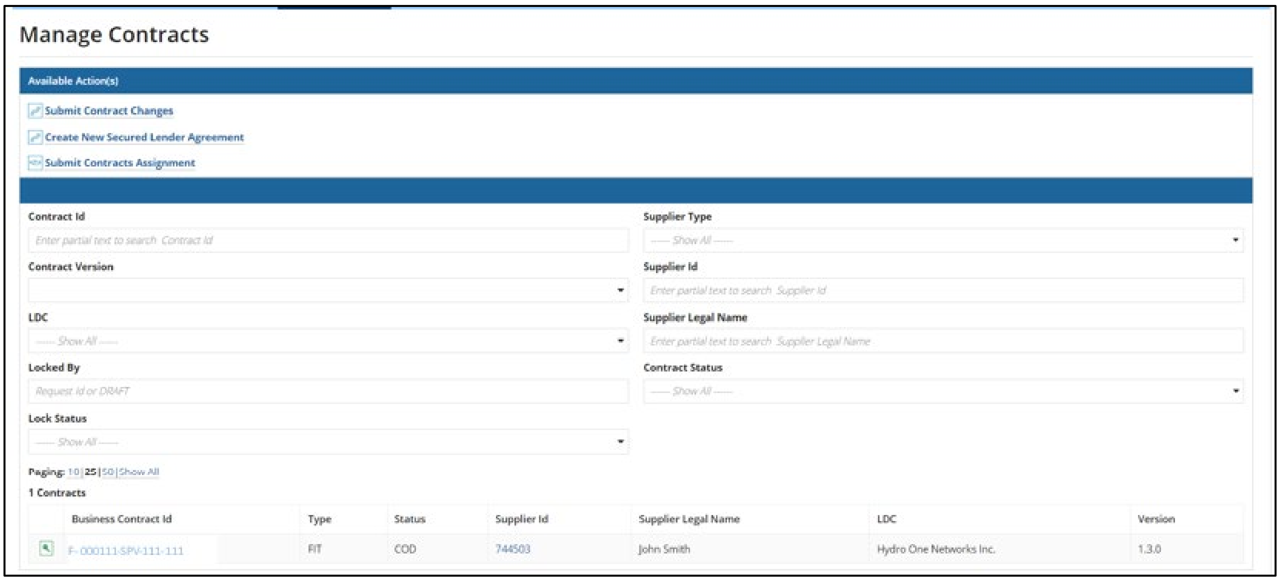
Downloading a FIT Contract

Procedure

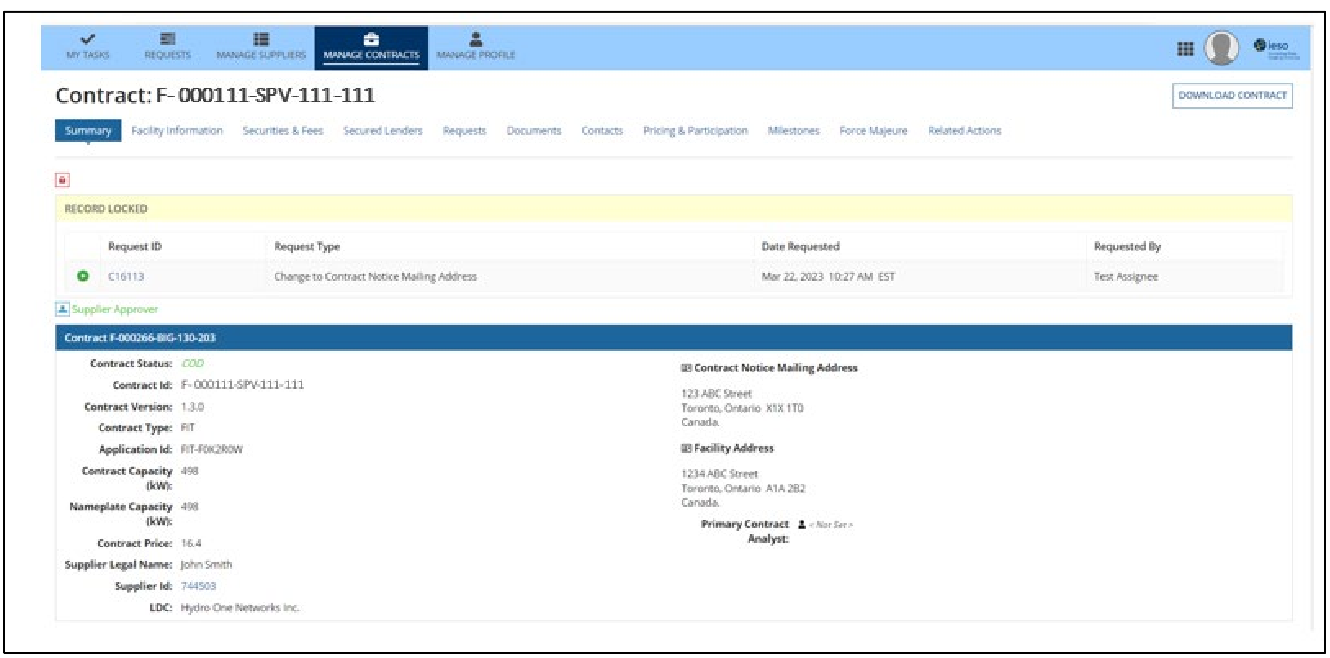
1. Select the **MANAGE CONTRACTS** tab.



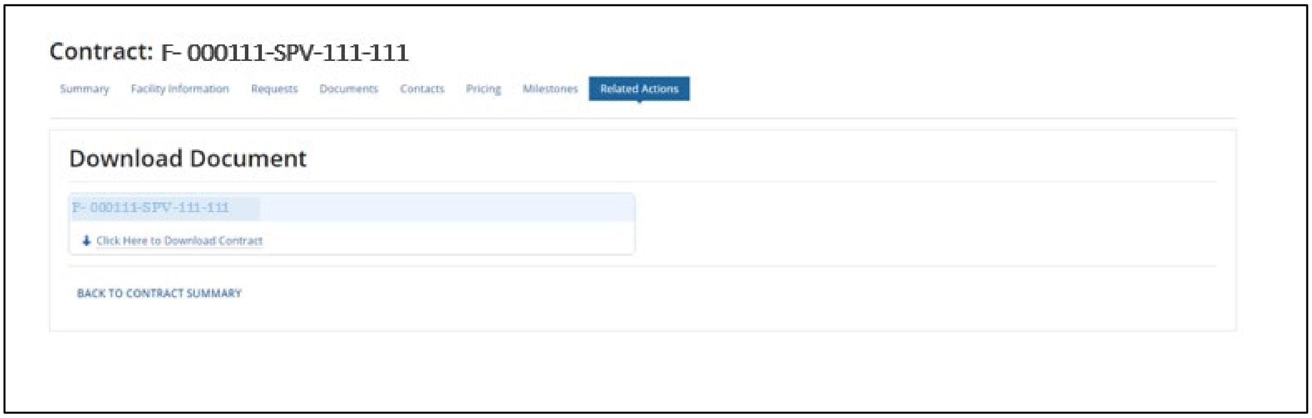
2. **Optional:** Use the filters to search for the Contract that you wish to download.
3. Select the **Business Contract ID** of the FIT Contract that you wish to download.



4. Select the **Download Contract** button on the top-right.



5. Select **Click Here to Download Contract**.



Managing Contract Requests

Contract Requests

Submitting a Request to Change a Contract Record

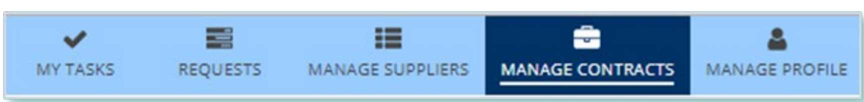
To update the record information in one or more Contracts, you can submit a Change to Contract Request. You can submit a Change to Contract Request for the following actions:

- Change to Facility Information
- Change to Contract Notice Mailing Address
- Change to Participation Information
- Secured Lender
- Force Majeure
- Declaring Commercial Operation (only available to Pre-COD Contracts)
- Termination
- Report
- Other

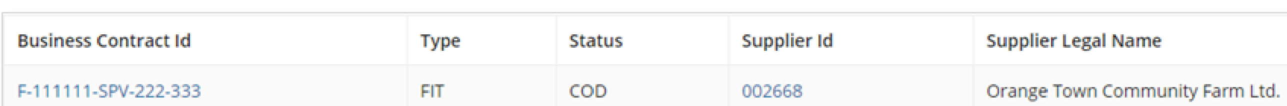
Once a Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Contract Request in Beacon.

Procedure

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

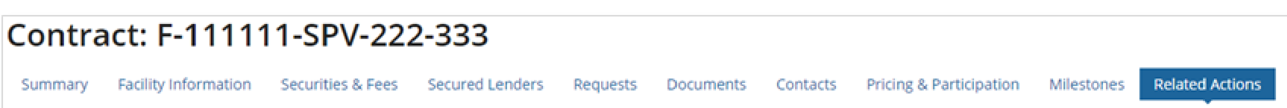


2. Select the Contract of interest.



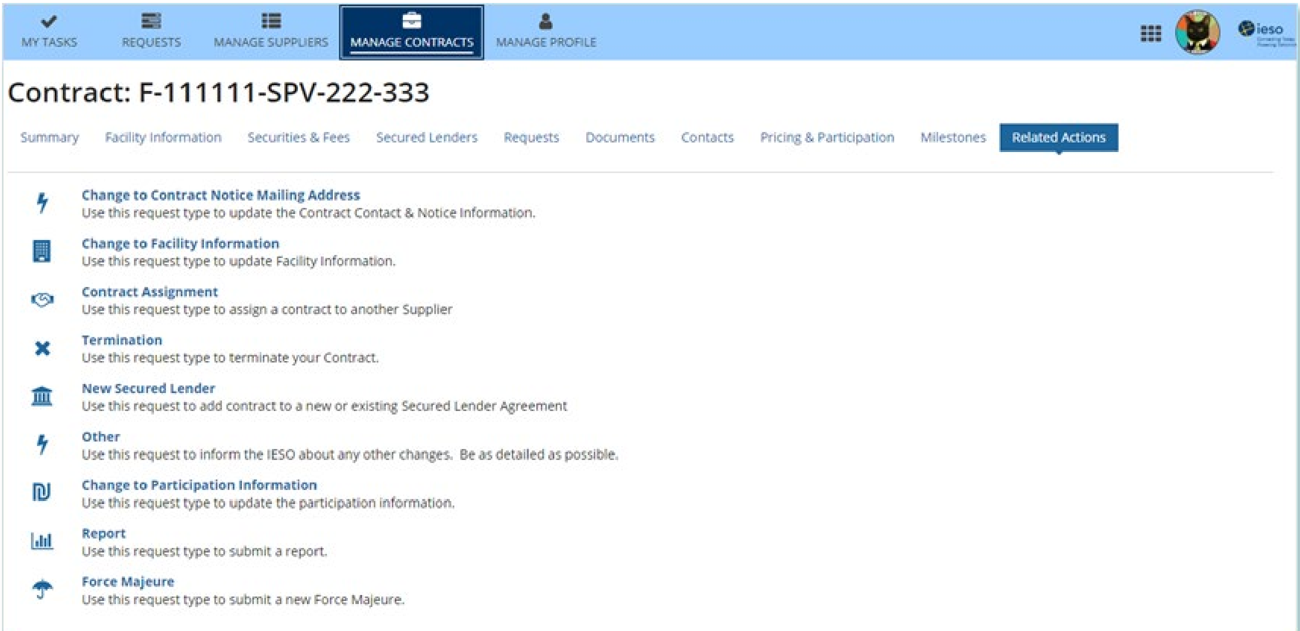
Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name
F-111111-SPV-222-333	FIT	COD	002668	Orange Town Community Farm Ltd.

3. Click on the **Related Actions** tab in the Contract record.



Note: Some Request Types allow for multiple Contracts to be changed at the same time. In order to complete a multiple Contract Change request contact your Contract Analyst for further instructions.

4. Select the type of Request you would like to submit.



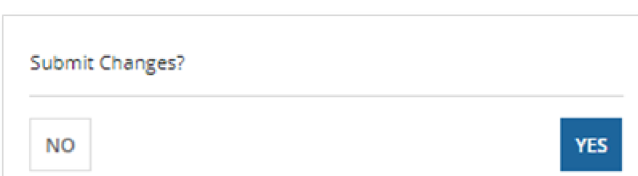
5. On the **Enter Changes** page, make the required changes to the Contract, then select **NEXT**.

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

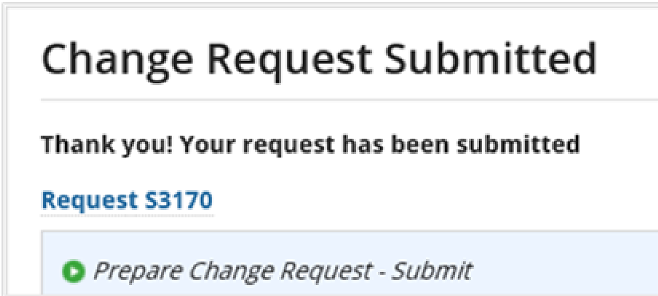
Note: When you submit a Contract Change Request, you might be required to submit certain documentation as evidence of certain information (e.g. legal entity type, resident status, etc.).

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

8. 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.



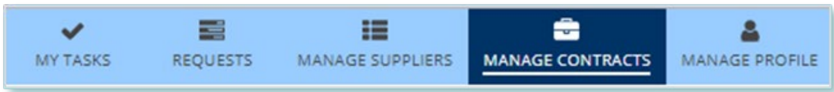
Submitting a Request to Terminate a Contract

During the lifecycle of your FIT Contract(s), you may wish to terminate the contract for certain reasons. To initiate a Contract termination, you can submit a Termination Request.

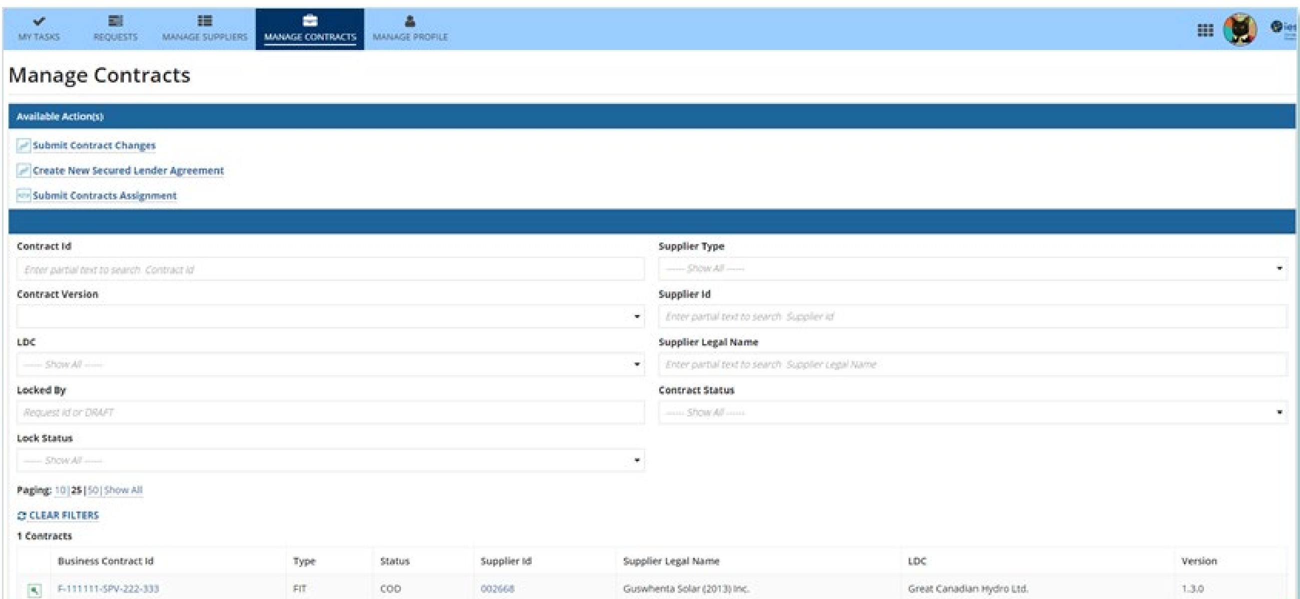
Once a Termination Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Termination Request in Beacon.

Procedure

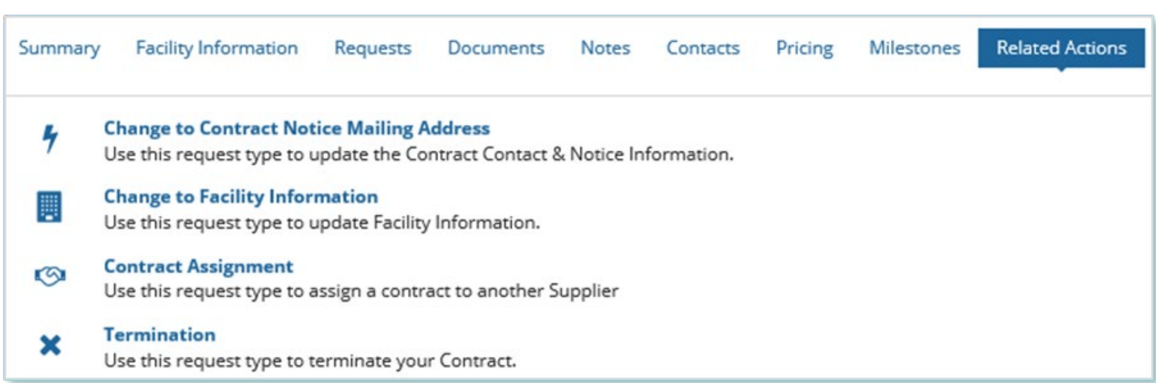
1. Select the **MANAGE CONTRACTS** tab.



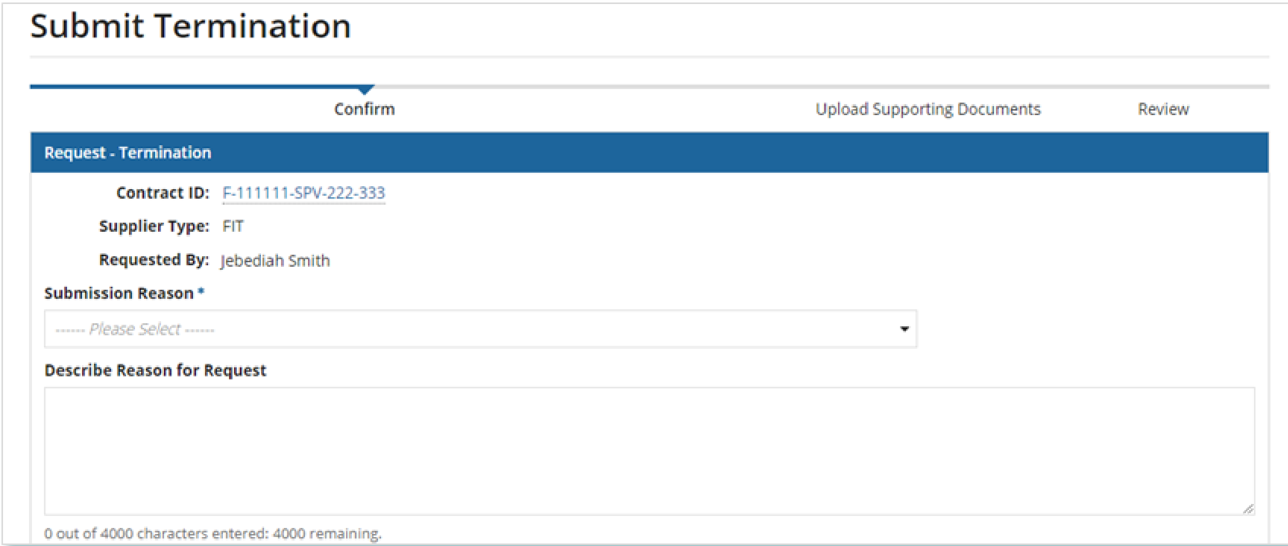
2. **Optional:** Use the filters to search for the Contract that you want to terminate.
3. Select the **Business Contract ID** to view the Contract that you want to terminate.



4. Select **Related Actions > Termination**.



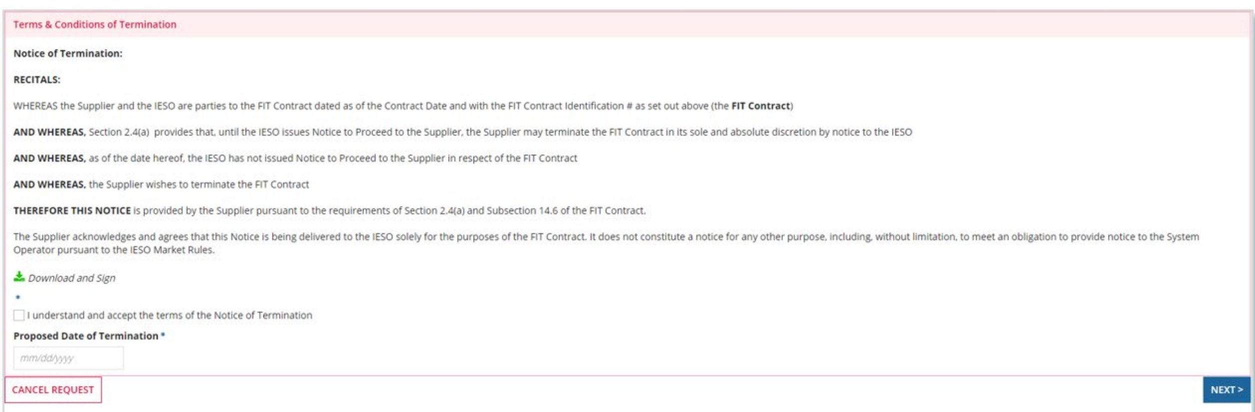
5. On the **Confirm** page, choose a submission reason, and then enter a description for your Request.



6. Read through the Terms & Conditions of Termination.
7. Download the termination form by selecting **Download and Sign**.

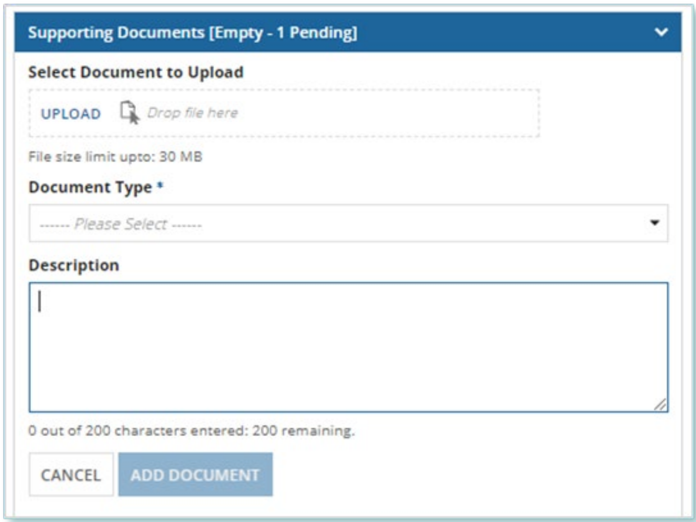
Note: You must print out this form to fill in and sign. Scan the completed form to submit it to the IESO when you upload supporting documents in step 10.

8. Check the box for I understand and accept the terms of the Notice of Termination.

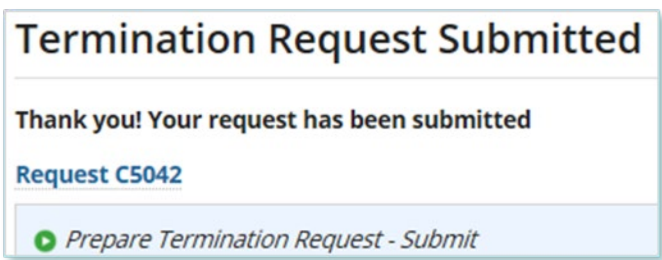


9. Choose a Proposed Date of Termination, and select **NEXT**.

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.



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

Adding or Removing Contacts from Suppliers or Contracts

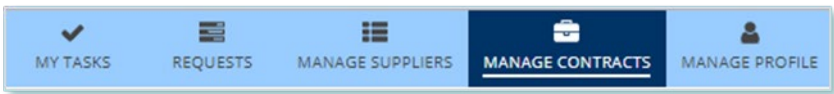
During the term of your FIT Contract(s), there might be changes to the Contacts who manage your Supplier(s) and/or Contract(s).

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

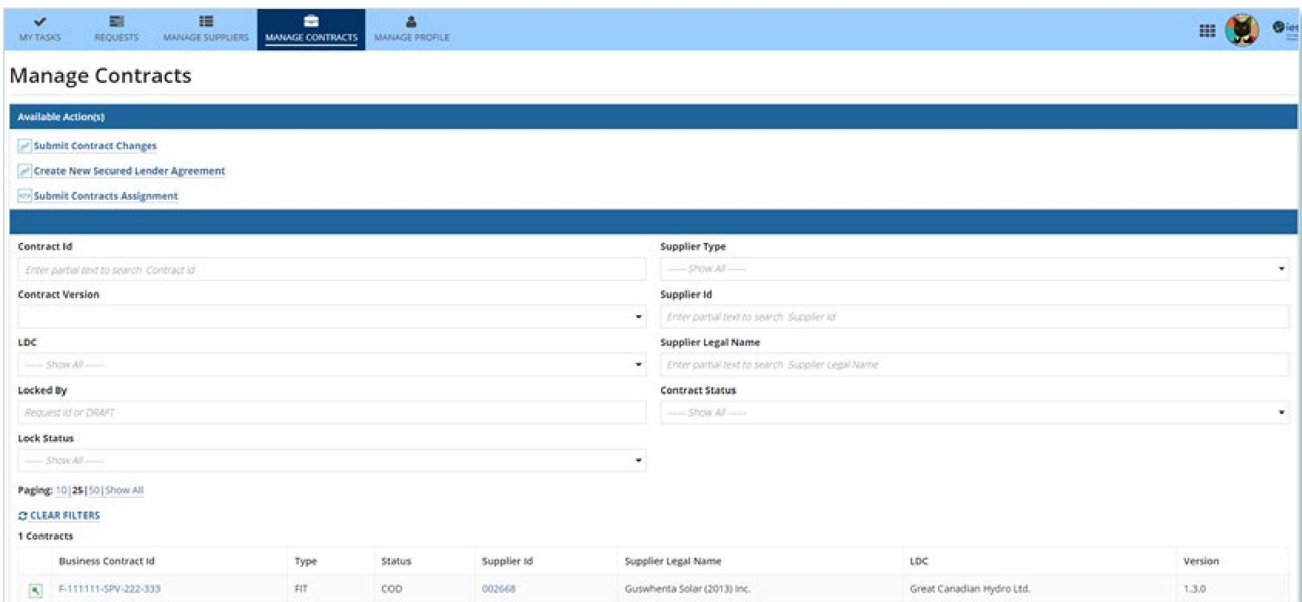
Adding Supplier Contacts to a Contract

Procedure

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

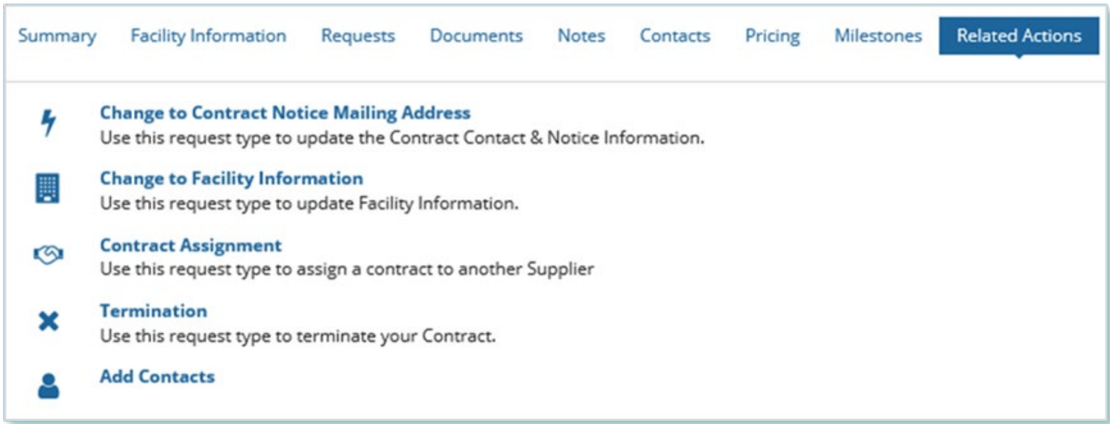


2. **Optional:** Use the filters to search for the Contract that you want to add Contacts to.
3. Select the **Business Contract ID** to view the Contract that you want to add Contacts to.



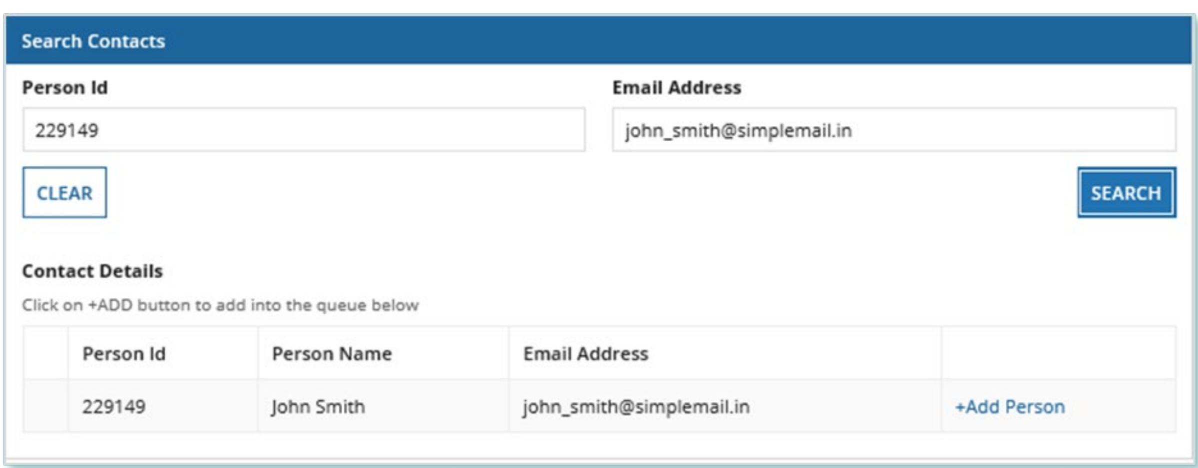
Note: You can add Contacts to a Contract only if they have already been added as a Contact to the Supplier. For instructions on how to Add and/or Remove Contacts from a Supplier, please refer to the Supplier Management user guide document.

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

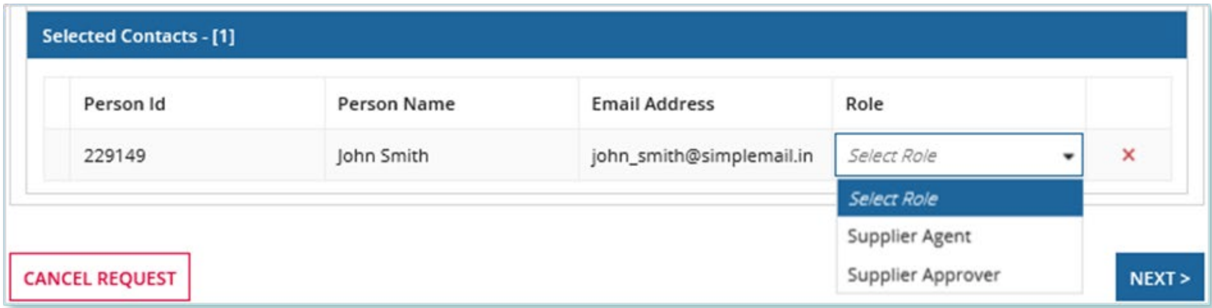


5. On the **Add Contacts to Contract** page, choose a reason for submitting the change, and then enter a description for your Request.

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



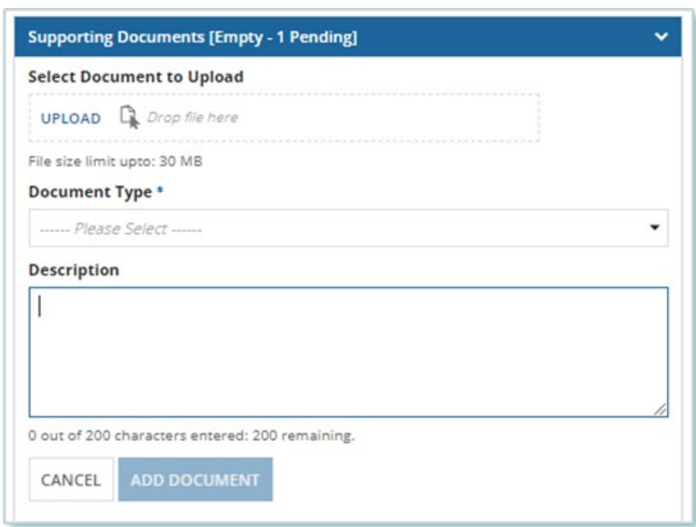
8. Choose a Role.



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

Note: In order to add a Contact, the Contact must have already registered with Beacon via a new account registration. For help on how to register a new user see our Registration Overview & Account Maintenance document.

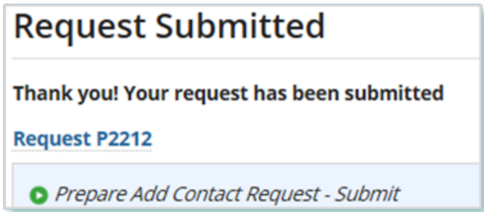
10. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



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

11. On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.
12. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.

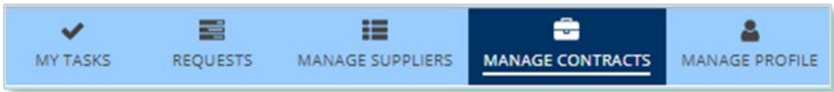
Note: The Request now has a **Request ID** that you can use to track its progress



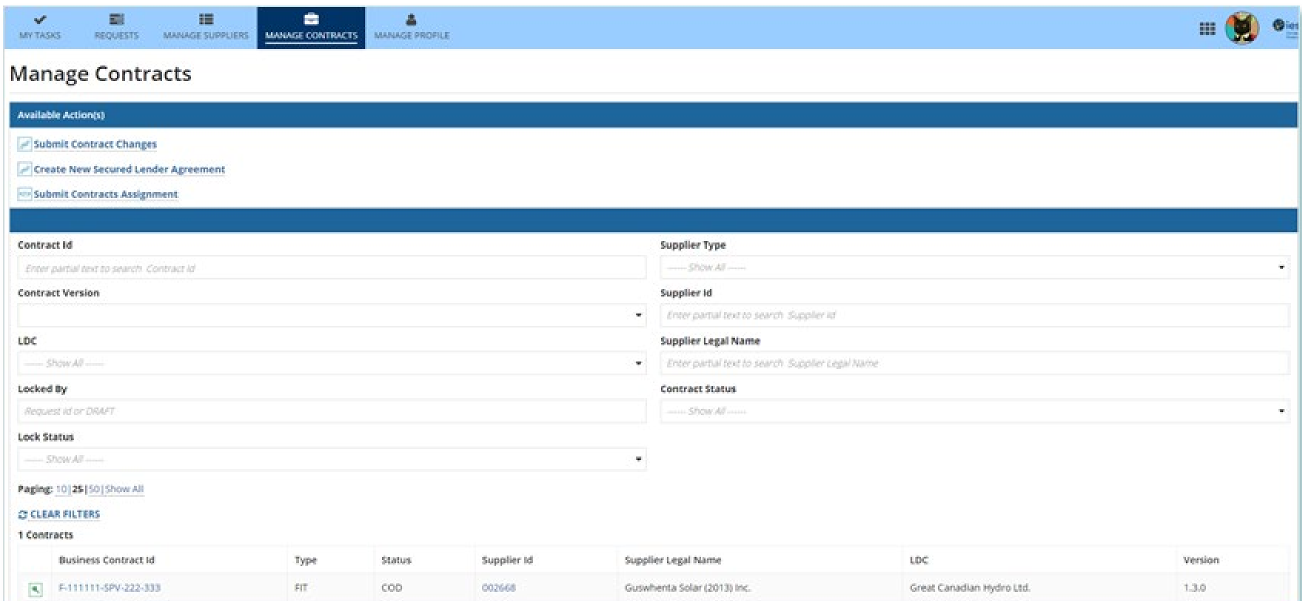
Removing Supplier Contacts from a Contract

Procedure

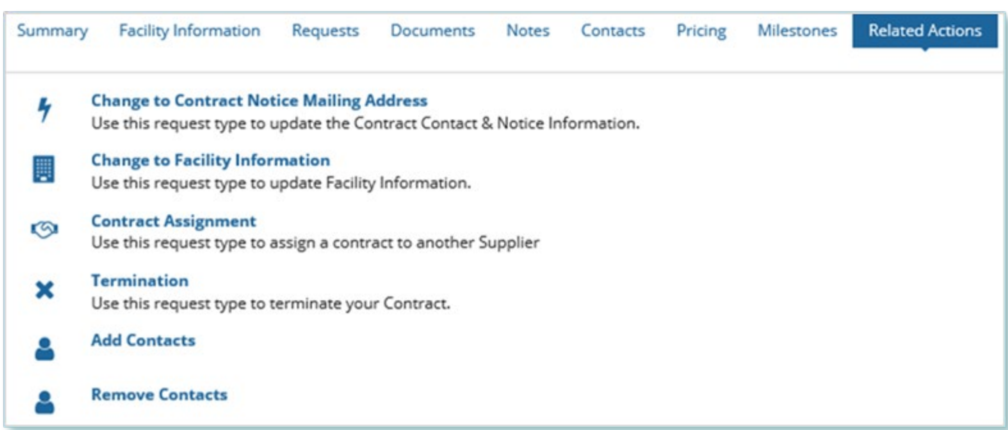
1. Select the **MANAGE CONTRACTS** Suppliers tab.



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

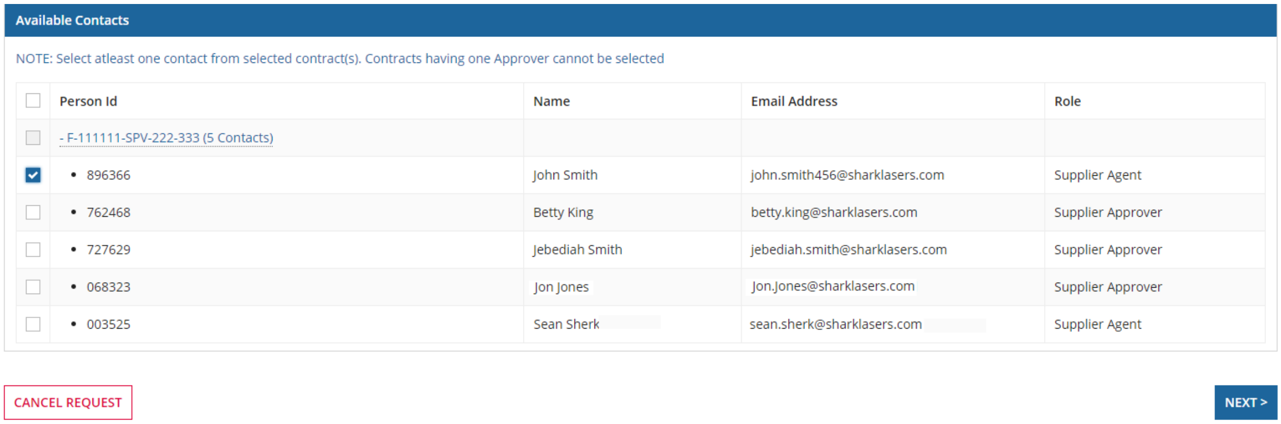


4. Select **Related Actions > Remove Contacts**.



5. On the **Remove Contacts from Contract** page, choose a reason for submitting the change, and then enter a description for your Request.
6. Check the box(es) for the Contact(s) that you want to remove from the selected contract(s), then select **NEXT**.

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



Available Contacts

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

	Person Id	Name	Email Address	Role
☐	- F-111111-SPV-222-333 (5 Contacts)			
☑	• 896366	John Smith	john.smith456@sharklasers.com	Supplier Agent
☐	• 762468	Betty King	betty.king@sharklasers.com	Supplier Approver
☐	• 727629	Jebediah Smith	jebediah.smith@sharklasers.com	Supplier Approver
☐	• 068323	Jon Jones	Jon.Jones@sharklasers.com	Supplier Approver
☐	• 003525	Sean Sherk	sean.sherk@sharklasers.com	Supplier Agent

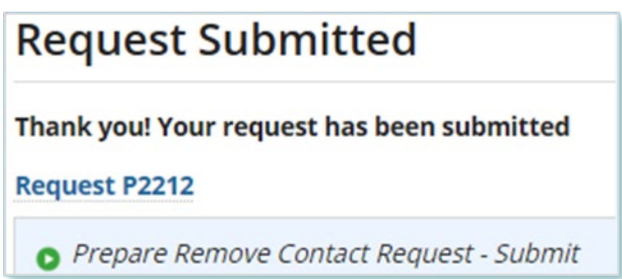
CANCEL REQUEST NEXT >

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.

Note: When you remove additional Contacts to Contracts, you might be required to submit certain 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.



Contract Request Tasks

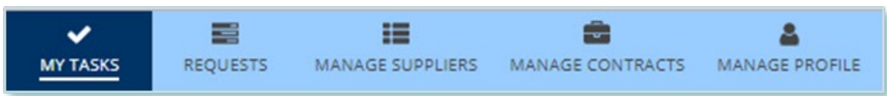
Reviewing Requests Submitted by a Supplier Approver

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

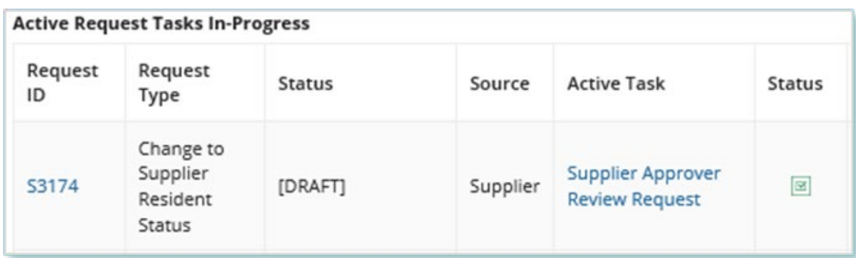
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



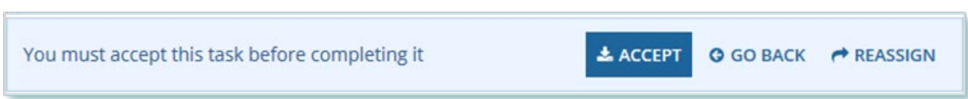
2. Select the **Active Task** for the Request that you want to review. This brings you to the **Review** page.



Active Request Tasks In-Progress

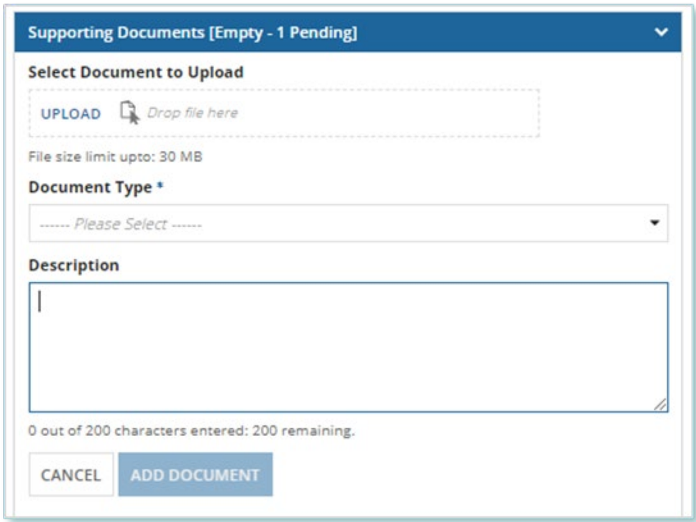
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

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

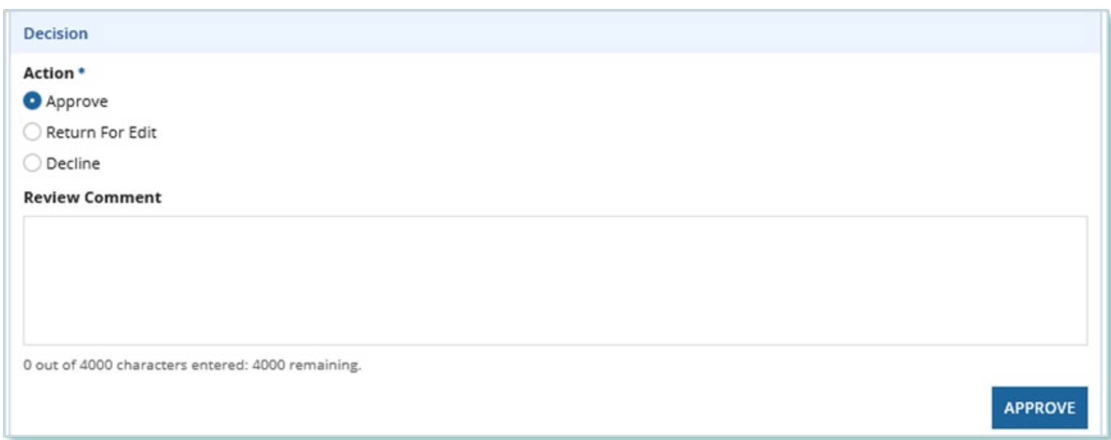


4. Review the values entered and the documents in the Request.

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



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



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

Depending on your decision, the Request may be under IESO review, returned to the Request initiator for edits, or the Request may be closed, respectively.

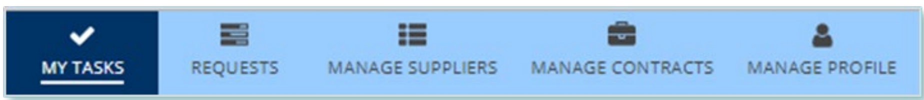
Providing Clarification for Returned Requests

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

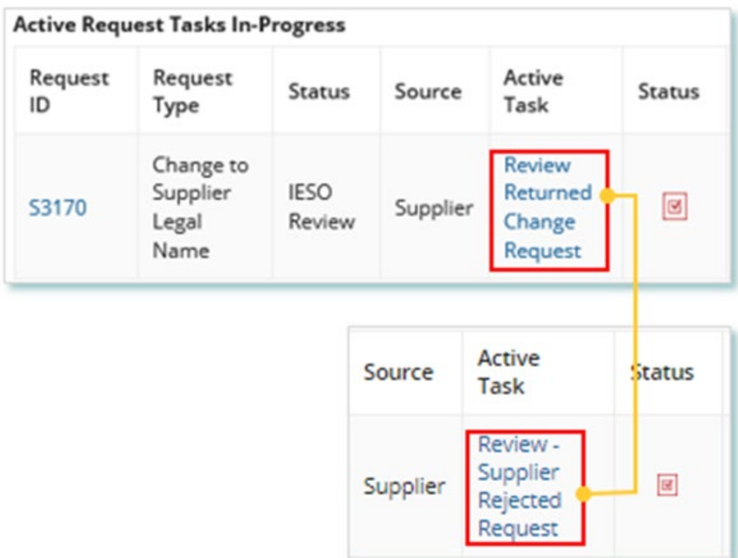
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



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

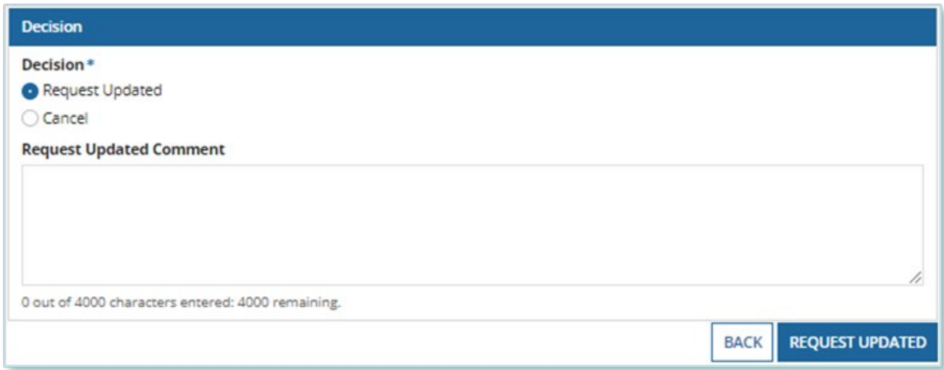


3. On each page, make changes to the fields that require updates.
4. On the **Supporting Documents page**, review any documents added by other users.
5. **Optional**: To upload supporting documents, select **+UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then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

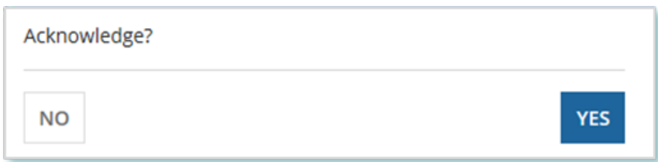
Note: When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

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

b. If you select **Cancel**, you can enter an explanatory note or comment to provide additional context for why you cancelled the Request, and then selec **Cancel**.



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



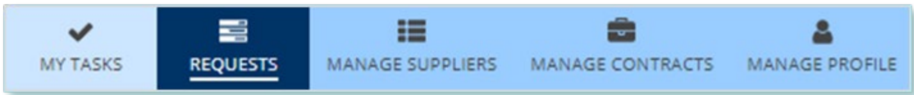
Cancelling a Submitted Request

You can cancel a Request that you submitted.

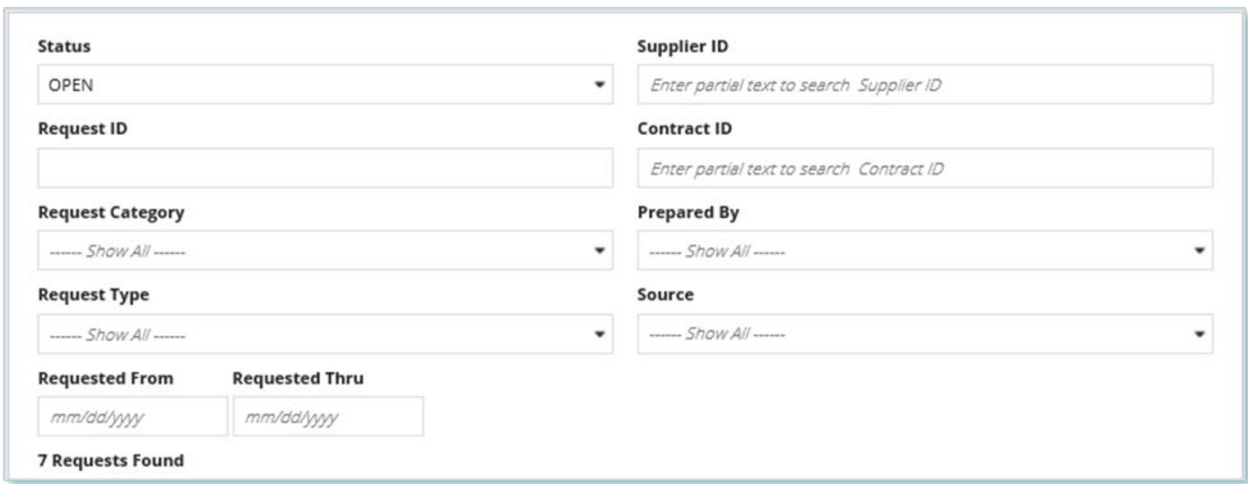
> **Note:** You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

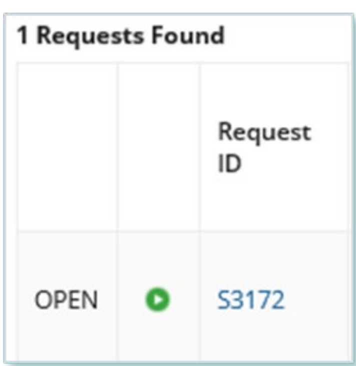
1. Select the **Requests** tab.



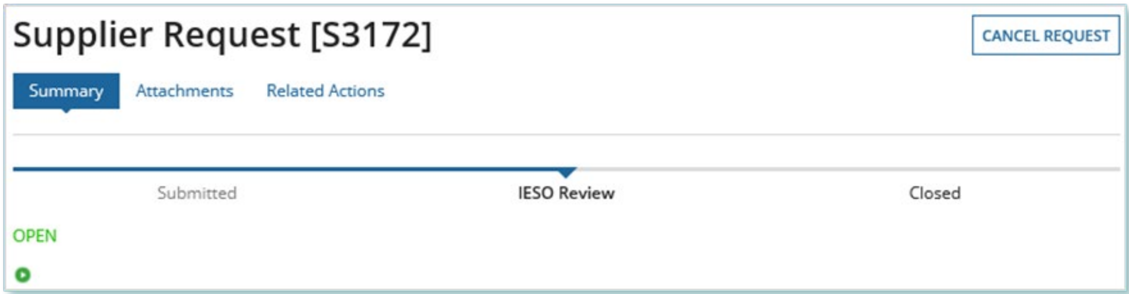
2. **Optional:** Use the filters to search for the Request that you want to cancel.



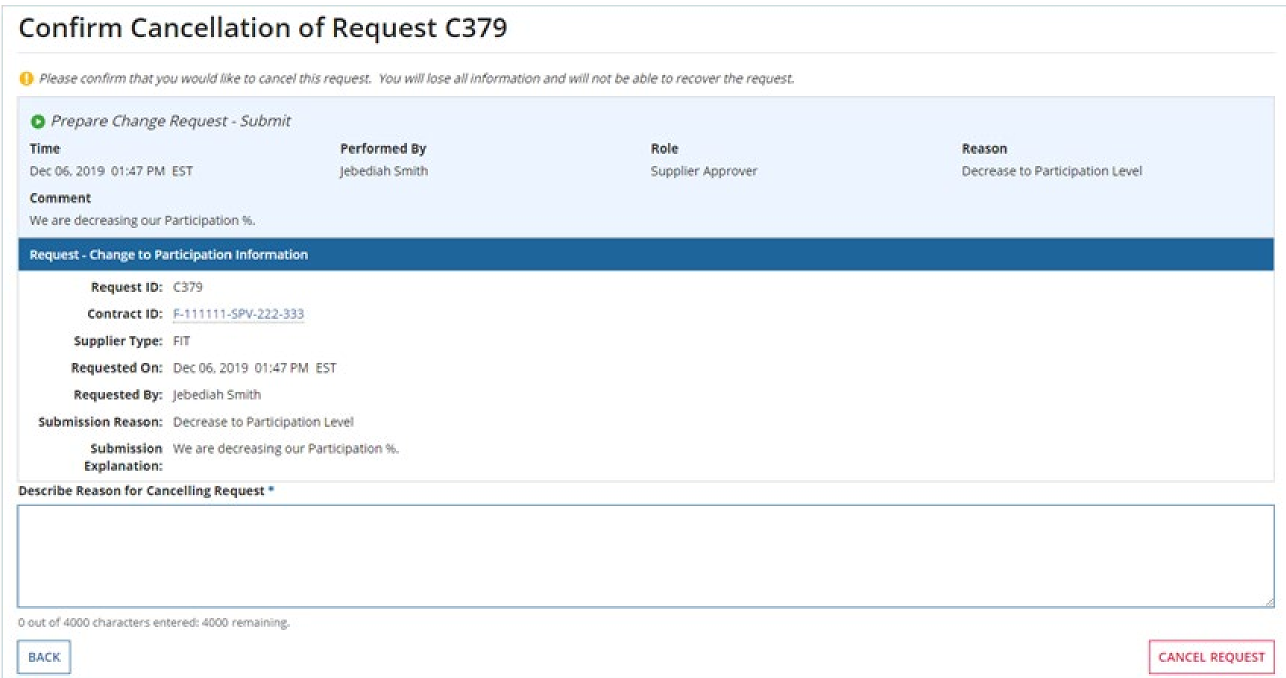
3. Select the **Request ID** to view the Request Record that you want to cancel.



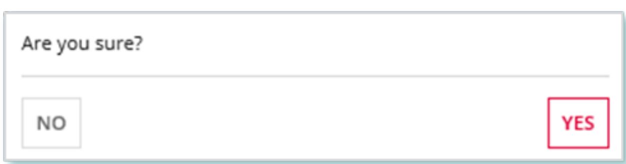
4. Select **CANCEL REQUEST**.



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

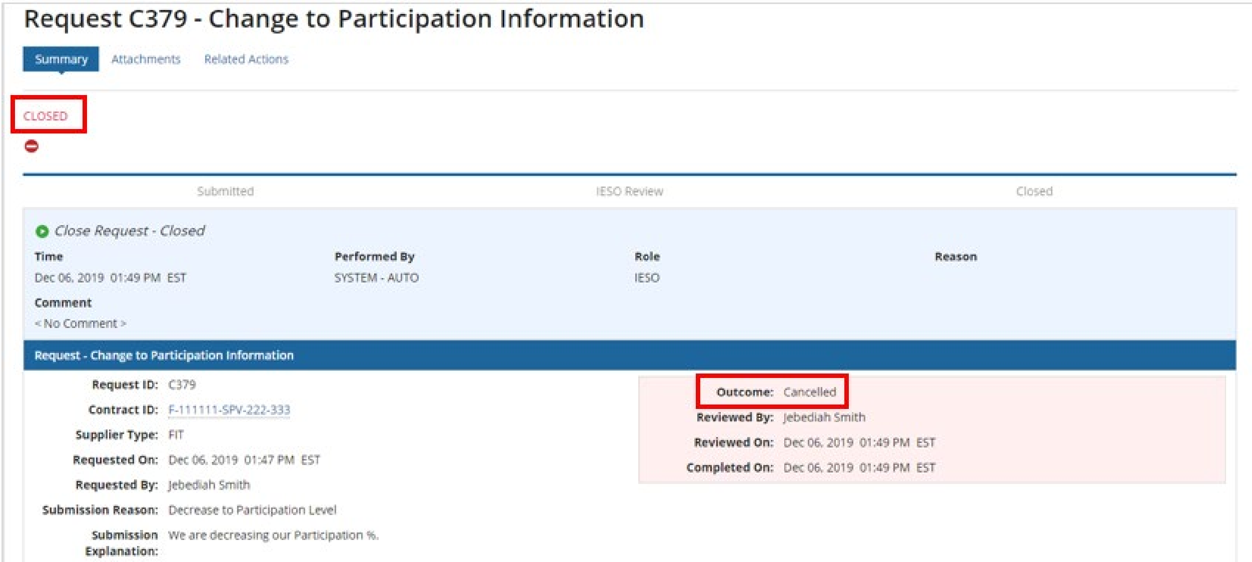


6. Select **CANCEL REQUEST**.
7. A dialog box is opened, select **Yes**.



8. Refresh your page.

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



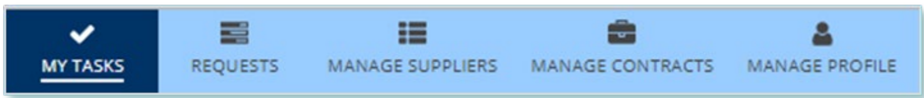
Providing Acknowledgement of a Request Outcome

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

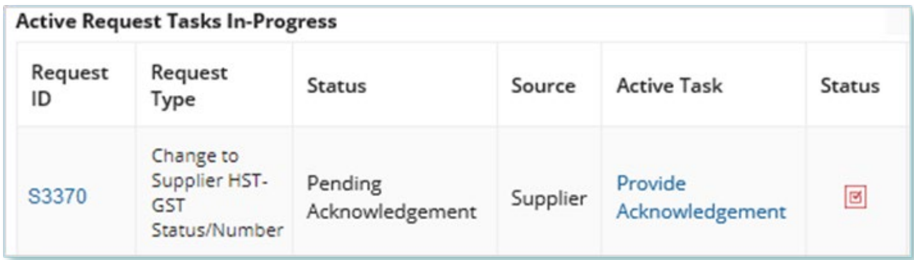
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you under **MY TASKS**.

Procedure

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



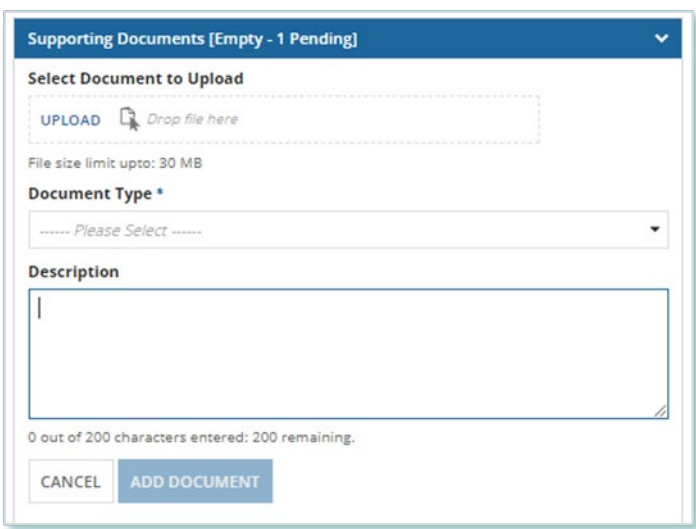
2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.



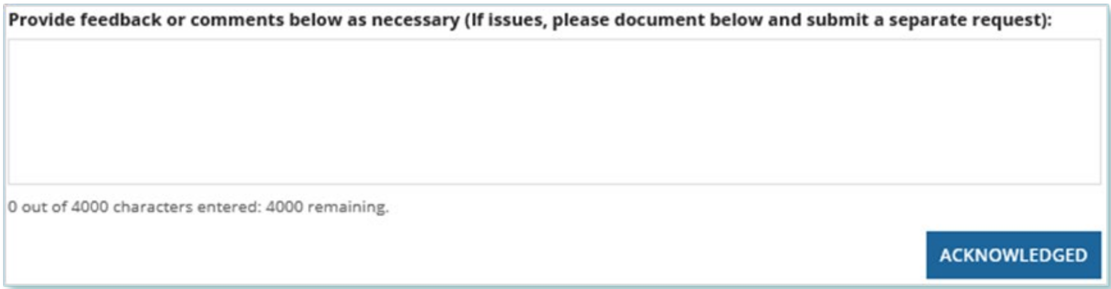
Active Request Tasks In-Progress

Request ID	Request Type	Status	Source	Active Task	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	Provide Acknowledgement	

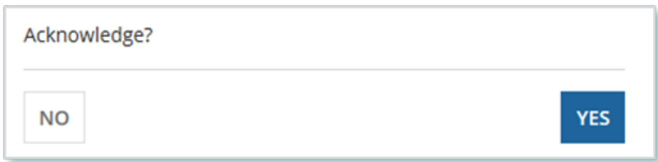
3. Review the information and any documents added by other users.
4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.



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



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

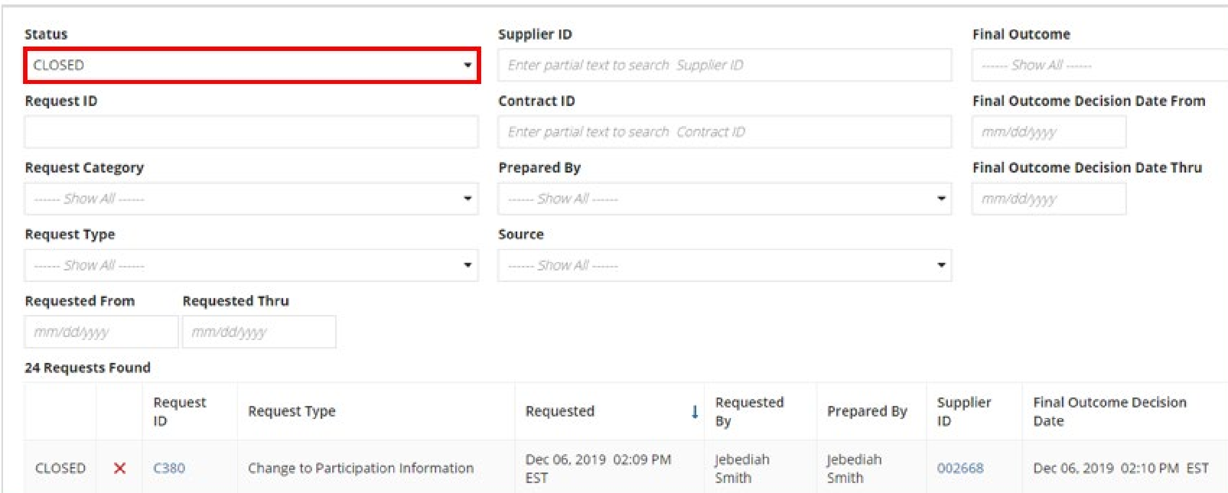


Viewing Request Notifications

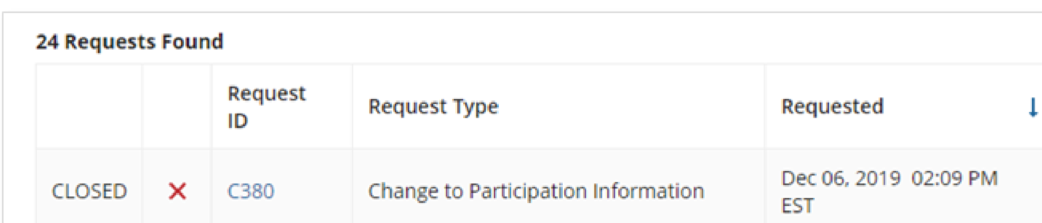
When a decision has been made by the IESO for a Request, you may receive a notification message and/or document that can be found in your Request records.

Procedure

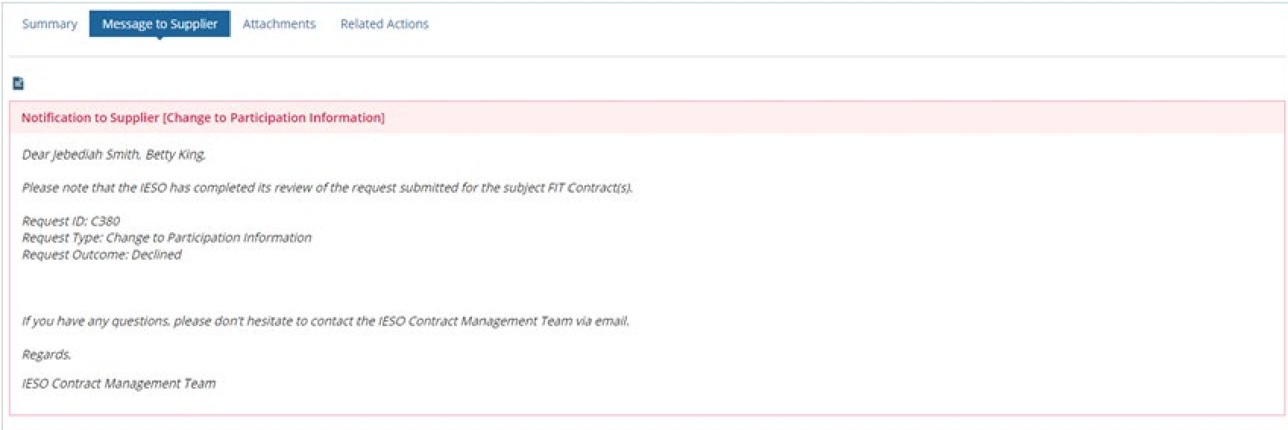
1. Select the **REQUESTS** tab
2. In the **Request Search** section, change Status to **CLOSED**.
3. **Optional:** Use the other filters to search for the Request record you want to view.



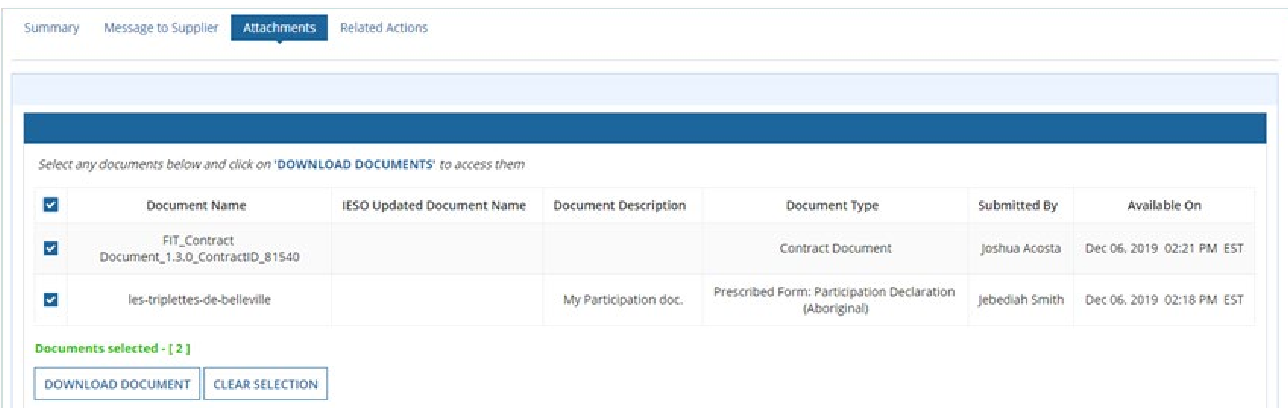
4. Select the **Request ID** to view the Request Record.



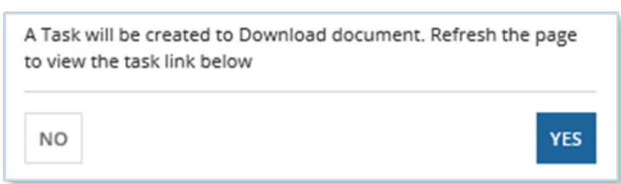
5. To see notification messages from IESO, select the **Message to Supplier** tab.



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

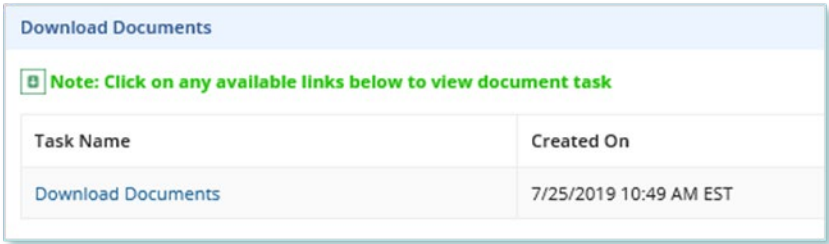


7. Check the box for the notification document, and then select **DOWNLOAD DOCUMENT**.
8. A dialog box is opened, select **Yes**.



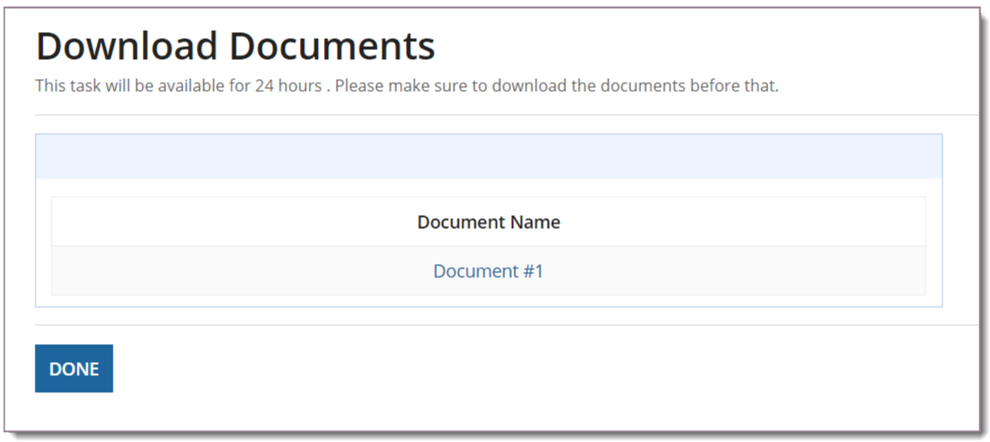
9. Refresh your page.

10. Select **DOWNLOAD DOCUMENTS**.



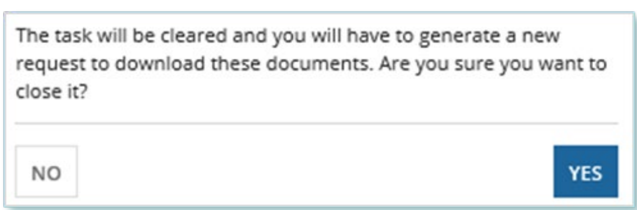
11. Select a document name to begin downloading it.

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



12. Select **DONE**.

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

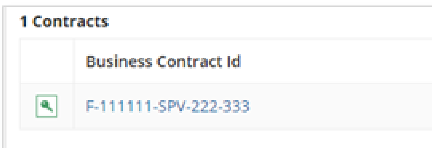


Downloading and Saving Documents

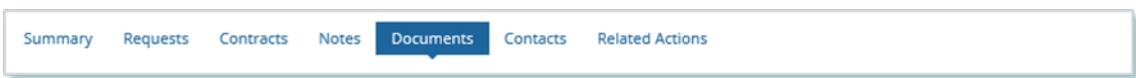
For your records, you can download and save documents related to your Suppliers, your Contracts, your profile account and/or any related Requests submitted.

Procedure

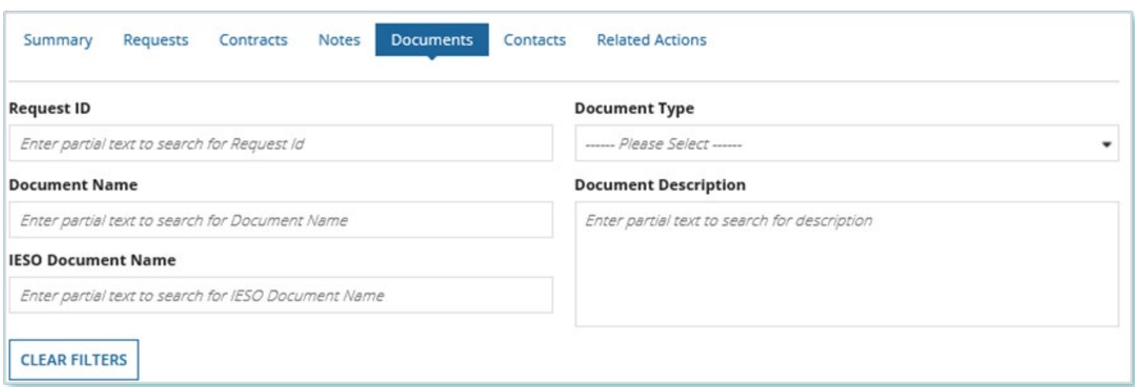
1. Select the tab that contains the Record you want to view.
    a. To download a Supplier document, select the **Manage Suppliers** tab.
    b. To download a Contract document, select the **Manage Contracts** tab.
    c. To download a Person document, select the **Manage Profile** tab.
2. Select the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



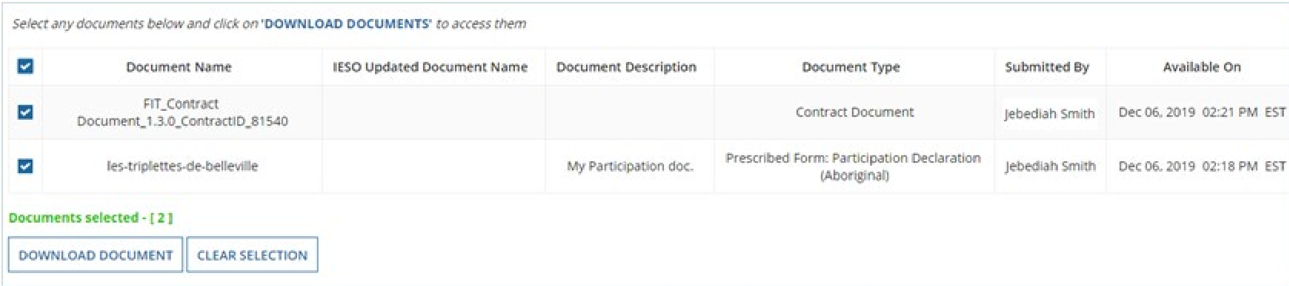
3. Select the **Documents** tab.



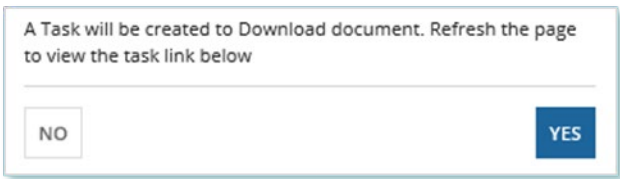
4. **Optional:** Use the filters to find a document that you want to download.



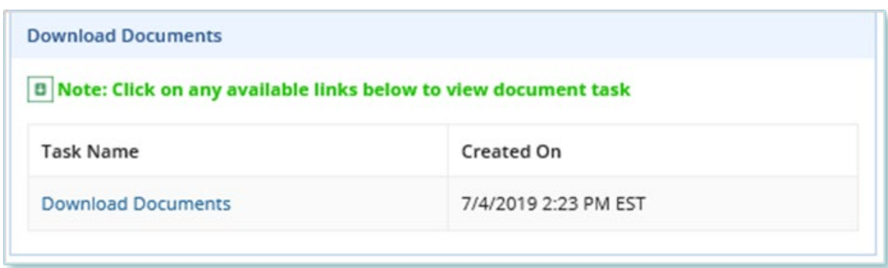
5. Check the box(es) for the document(s) that you want to download.



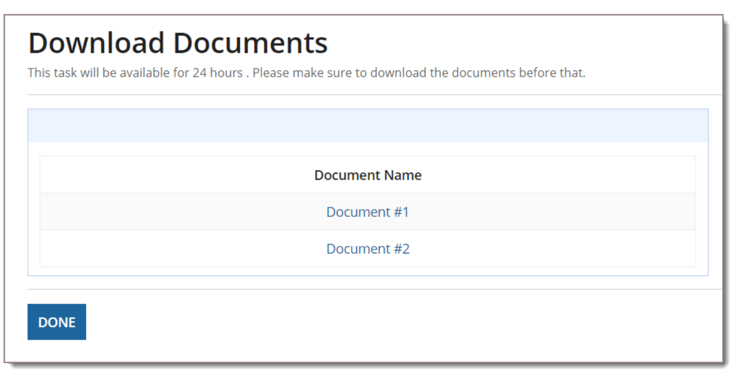
6. Select **DOWNLOAD DOCUMENT**.
7. A dialog box is opened, select **Yes**.



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

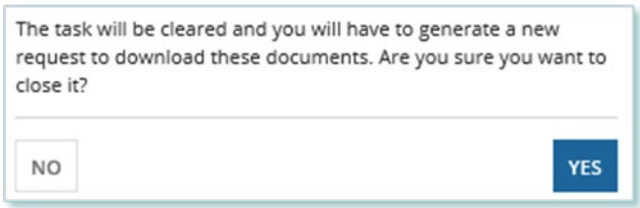


10. To begin saving documents, select the document name for the document(s) that you want to download.



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

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



Additional Resources

Additional resources can be found at the following links:

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

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