Beacon microFIT Supplier

Digital User Guide
Verification Tasks
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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.

<table>
<thead>
<tr>
<th>Beacon Program Roles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Approver</td>
<td>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. <strong>Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.</strong></td>
</tr>
<tr>
<td>Supplier Agent</td>
<td>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. <strong>A Supplier Agent’s actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.</strong></td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>IESO</td>
<td>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.</td>
</tr>
</tbody>
</table>
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
2. Enter your username (email address) and password.
3. If you have set up multiple factors, you can choose which factor you will verify to login. Switch between factors by selecting the drop-down menu arrow next to the authentication icon. Please be aware that you are only required to verify one factor to login.
4. Once you have selected your factor, you will be prompted to provide the answer to your Security Question or your SMS/Voice Call Code. Type in the answer or code and click “Verify”. Please be aware that the answer is case sensitive.

5. On your My Apps Dashboard, select the tile that says “Online IESO”.

![Security Question Image](image)

![My Apps Dashboard Image](image)
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.
Managing Verification Tasks

Completing a Person Verification Task

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

**Procedure**

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

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

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

4. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.
Note: If there have been any material changes to your personal contact information (e.g. a name change), you might be required to submit certain documentation as evidence of the change.

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

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

7. Select Submit Changes. If you did not make any changes, select Verify No Changes.
8. A dialog box is opened, select **Yes**. Once the Request is submitted, a confirmation page is displayed.
Completing a Supplier Verification Task

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

**Procedure**

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

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

   ![Active Request Tasks In-Progress Table](image)

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

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

4. If your Supplier information has changed, you may be able to update your Supplier information directly on the Request. However, if the Supplier information fields are greyed out, you will NOT be able to make any changes.
5. **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the Submission Comment field.

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

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

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

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

**Procedure**

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

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

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

4. If your Contract information has changed, you may be able to update your Contract Information directly on the Request. However, if the Contract information fields are greyed out, you will NOT be able to make any changes.

5. **Optional:** You can enter an explanatory note or comment to provide additional context to a submitted change in the Submission Comment field.
6. Select **NEXT** and you will be forwarded to the **Review** Page. On the Review page, look over all your changes and ensure the information is accurate before submitting.

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

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

Reviewing Requests Submitted by a Supplier Approver

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

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

**Procedure**

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

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

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.

![Supporting Documents](image)

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

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

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

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

7. A dialog box is opened, select **Yes**. Depending on your decision, the Request may be under

![Decision](image)

IESO review, returned to the Request initiator for edits, or the Request may be closed, respectively.
Providing Clarification for Returned Requests

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

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

Procedure

1. Select the MY TASKS tab.

2. Select the Active Task for the Request you want to work on. On each page, make changes to the fields that require updates.

3. On the Supporting Documents page, review any documents added by other users.

4. Optional: On the Upload Supporting Documents page, select the +UPLOAD NEW DOCUMENT icon. Attach a document, choose a document type, enter a description, and then select the ADD DOCUMENT icon.
Note: When you respond to a Request to provide clarification, you might be required to submit certain documentation as requested by the IESO. This will be specified in the task details.

5. Review the changes summarized on the Review page.

6. Under Decision, choose either Request Updated or Cancel.
   a. If you select Request Updated, you can enter an explanatory note or comment to provide additional context on what was clarified, and then select Request Updated.
   b. If you select Cancel, you can enter an explanatory note or comment to provide additional context for why you cancelled the Request, and then select Cancel.

7. A dialog box is opened, select Yes.
Providing Acknowledgement of a Request Outcome

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

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

Procedure

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

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

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

4. **Optional**: To upload supporting documents, select **UPLOAD NEW DOCUMENT**. Attach a document, choose a document type, enter a description, and then select ADD DOCUMENT.
5. **Optional:** You can enter an explanatory note or comment to provide additional context to the Request for acknowledgement in the comment field provided.

6. Select **ACKNOWLEDGED**.

7. A dialog box is opened, select Yes.
Viewing Request Notifications

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

Procedure

1. Select the **REQUESTS** tab.

2. Select 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.

12. Select **DONE**.

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

**Note:** These documents will be available for download for 24 hours.
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:
microFIT Homepage: http://www.ieso.ca/Get-Involved/microfit/news-overview