



Beacon microFIT Supplier

Digital User Guide
Contract Management

Table of Contents

Getting Started	2
What is Beacon?	2
microFIT Program Roles	2
Sign in to Beacon	4
Contract Overview	7
Manage Contracts Page	7
Contract Record Overview	8
Downloading a microFIT Contract	9
Managing Contract Requests	11
Contract Requests	11
Submitting a Request to Change a Contract Record	11
Submitting a Request to Terminate a Contract	12
Adding or Removing Contacts from Suppliers or Contracts	15
Adding Supplier Contacts to a Contract	15
Removing Supplier Contacts from a Contract	18
Contract Request Tasks	20
Reviewing Requests Submitted by a Supplier Approver	20
Providing Clarification for Returned Requests	22
Cancelling a Submitted Request	24
Providing Acknowledgement of a Request Outcome	27
Viewing Request Notifications	29
Downloading and Saving Documents	32
Additional Resources	34

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.

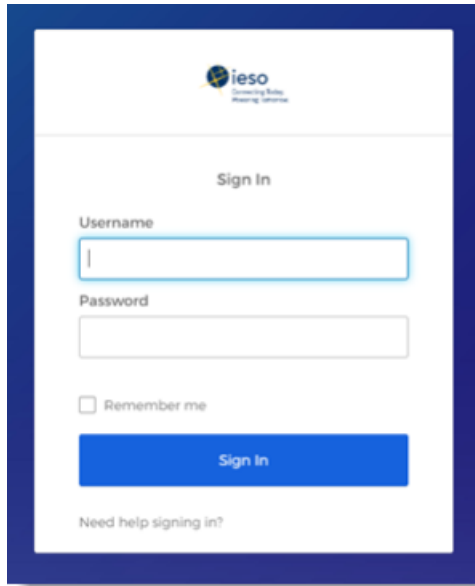
Sign in to Beacon

To begin managing your microFIT Contracts, sign in to Beacon. You can sign in to Beacon on your computer, mobile, or tablet device.

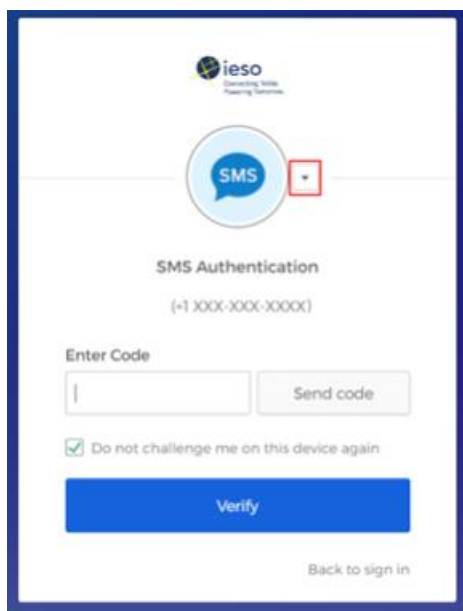
Procedure

Navigate to [IESO Gateway - Sign In](#)

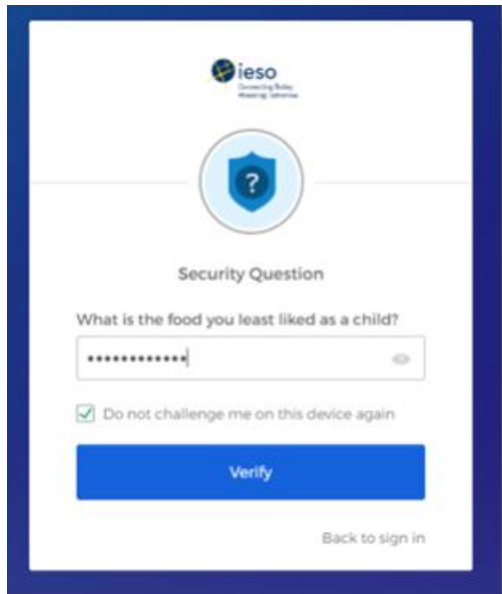
Enter your username (email address) and password.

A screenshot of the IESO Sign In page. At the top is the IESO logo with the tagline "Generating Better Planning Solutions". Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. At the bottom, there is a link that says "Need help signing in?".

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.

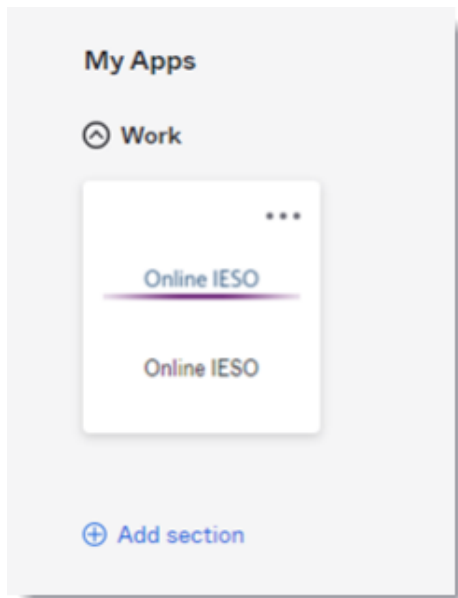
A screenshot of the IESO SMS Authentication page. At the top is the IESO logo. Below it is a circular icon with "SMS" inside, next to a red square containing a white drop-down arrow. The heading "SMS Authentication" is followed by a placeholder number "(+1 XXX-XXX-XXXX)". There is an "Enter Code" label above an input field. To the right of the input field is a "Send code" button. Below the input field is a checked checkbox with the text "Do not challenge me on this device again". A blue "Verify" button is at the bottom. A link "Back to sign in" is at the very bottom.

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.**



The screenshot shows the IESO login verification screen. At the top is the IESO logo with the tagline "Connecting People. Powering Tomorrow." Below the logo is a blue shield icon with a white question mark. The text "Security Question" is centered. Below this is the question "What is the food you least liked as a child?". A text input field contains several asterisks, indicating a masked password or answer. To the right of the input field is an eye icon for toggling visibility. Below the input field is a checkbox labeled "Do not challenge me on this device again" which is checked. At the bottom is a large blue "Verify" button. In the bottom right corner, there is a link that says "Back to sign in".

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



Next you will be brought to the Available Programs Dashboard. Select the **FIT-microFIT Program** tile to enter 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 Program



[Click here to enter Beacon](#)

*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.*

Industrial Energy Efficiency Program



[Register for Industrial Energy Efficiency Program](#)

The Save on Energy Industrial Energy Efficiency Program (IEEP) is a new program for large industrial consumers in Ontario. It provides financial incentives to implement projects that deliver electricity savings through upgrading of industrial processes. The IEEP is intended to support large, complex, customer-driven solutions that result in verifiable electricity system benefits from implementing proven, commercially available technologies.

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.

Contract Overview

Manage Contracts Page

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

You can search for Contracts by using these filters.

The screenshot shows the 'MANAGE CONTRACTS' page. At the top is a navigation bar with 'MY TASKS', 'REQUESTS', 'MANAGE SUPPLIERS', 'MANAGE CONTRACTS' (active), and 'MANAGE PROFILE'. Below this is a section for 'Available Action(s)'. The main area contains several filters: 'Contract Id' (text input), 'Contract Version' (dropdown), 'LDC' (dropdown), 'Locked By' (text input), 'Lock Status' (dropdown), 'Supplier Type' (dropdown), 'Supplier Id' (text input), 'Supplier Legal Name' (text input), and 'Contract Status' (dropdown). Below the filters is a table with 2 contracts. The table has columns: Business Contract Id, Type, Status, Supplier Id, Supplier Legal Name, LDC, and Version. The first contract is 'FIT-MABCDEF', 'microFIT', 'Executed', '662121', 'John S Smith', 'Hydro One Networks Inc.', and '1.3'. There is a 'LOCKED' icon next to the Business Contract Id. Annotations with yellow lines point to various elements: 'Available Action(s)', 'Contract Id', 'Contract Version', 'LDC', 'Locked By', 'Lock Status', 'Supplier Type', 'Supplier Id', 'Supplier Legal Name', 'Contract Status', 'Paging: 10 | 25 | 50 | Show All', '2 Contracts', 'Business Contract Id', 'Type', 'Status', 'Supplier Id', 'Supplier Legal Name', 'LDC', 'Version', and the 'LOCKED' icon.

Available Action(s)

Contract Id
Enter partial text to search Contract Id

Contract Version
----- Show All -----

LDC
----- Show All -----

Locked By
Request Id or DRAFT

Lock Status
----- Show All -----

Supplier Type
----- Show All -----

Supplier Id
Enter partial text to search Supplier Id

Supplier Legal Name
Enter partial text to search Supplier Legal Name

Contract Status
----- Show All -----

Paging: 10 | 25 | 50 | Show All

2 Contracts

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
FIT-MABCDEF	microFIT	Executed	662121	John S Smith	Hydro One Networks Inc.	1.3

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

To see a Contract Record, select the **Business Contract ID**.

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

Select any header to sort your Contracts by those criteria.

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

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

To download your Contract, select **Download Contract**.

Contract: FIT-MABCDEF

Summary | Facility Information | Requests | Documents | Contacts | Pricing | Milestones | Related Actions

RECORD LOCKED

Request ID	Request Type	Date Requested	Requested By
CB550	Change to Contract Notice Mailing Address	Dec 09, 2022 01:01 PM EST	Jon Snow

Supplier Approver

Contract FIT-MABCDEF

Contract Status: *Executed*

Contract Id: FIT-MABCDEF

Contract Version: 1.3

Contract Type: microFIT

Nameplate Capacity (kW): 10

Contract Price: 80.2

Supplier Legal Name: John S Smith

Supplier Id: 662121

LDC: Hydro One Networks Inc.

Contract Notice Mailing Address

120 Adelaide
Toronto, Ontario L0B 1B0
Canada.

Facility Address

120 Adelaide Street West,
Toronto, Ontario X1X 2X2
Canada.

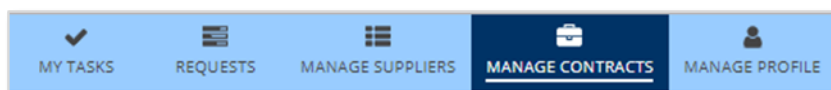
DOWNLOAD CONTRACT

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

Downloading a microFIT 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 microFIT Contract that you wish to download.

Manage Contracts

Available Action(s)

Contract Id:

Contract Version:

LDC:

Locked By:

Lock Status:

Paging: 10 | 25 | 50 | Show All

2 Contracts

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
FIT-MABCEDEF	microFIT	Executed	662121	John S Smith	Hydro One Networks Inc.	1.3

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

Contract: FIT-MABCEDEF [DOWNLOAD CONTRACT](#)

Summary | Facility Information | Requests | Documents | Contacts | Pricing | Milestones | Related Actions

RECORD LOCKED

Request ID	Request Type	Date Requested	Requested By
C8550	Change to Contract Notice Mailing Address	Dec 09, 2022 01:01 PM EST	Jon Snow

Supplier Approver

Contract FIT-MABCEDEF

Contract Status: **Executed**

Contract Id: FIT-MABCEDEF

Contract Version: 1.3

Contract Type: microFIT

Nameplate Capacity: 10 (kW)

Contract Price: 80.2

Supplier Legal Name: John S Smith

Supplier Id: 662121

LDC: Hydro One Networks Inc.

Contract Notice Mailing Address

120 Adelaide
Toronto, Ontario L0B 1B0
Canada.

Facility Address

120 Adelaide Street West,
Toronto, Ontario X1X 2X2
Canada.

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

Contract: FIT-MABCDEF

[Summary](#) [Facility Information](#) [Requests](#) [Documents](#) [Contacts](#) [Pricing](#) [Milestones](#) [Related Actions](#)

Download Document

FIT-MABCDEF

[Click Here to Download Contract](#)

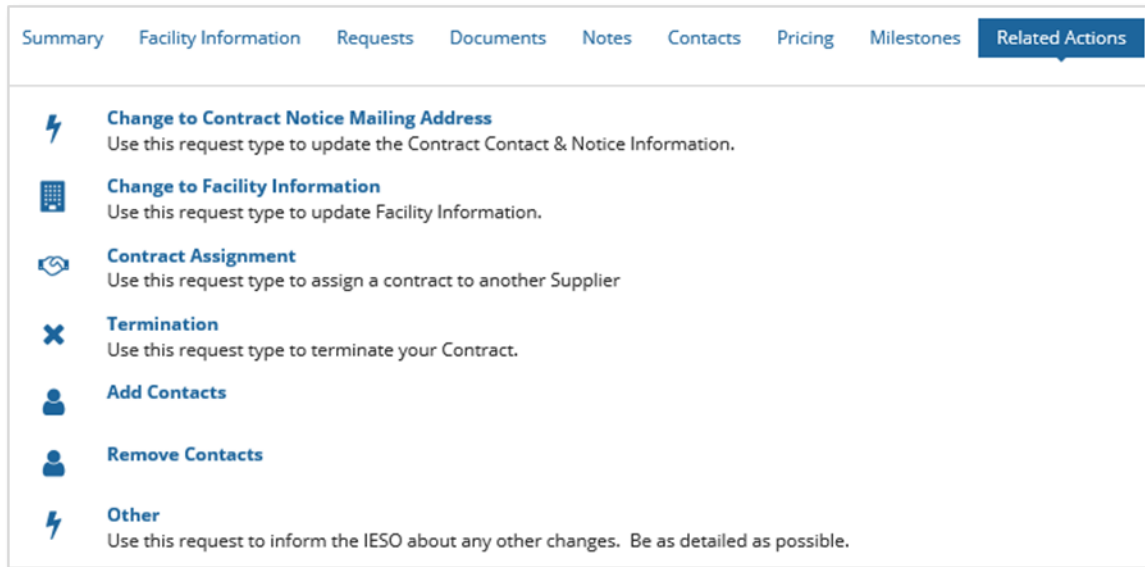
[BACK TO CONTRACT SUMMARY](#)

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 initiate a Contract Request for a Contract by going to a Contract Record, and then selecting **Related Actions** and the action that you want to take.



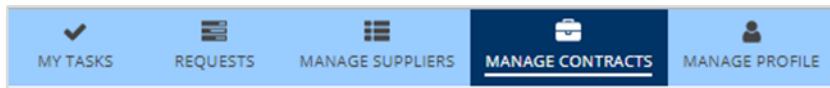
Submitting a Request to Terminate a Contract

During the lifecycle of your microFIT 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.

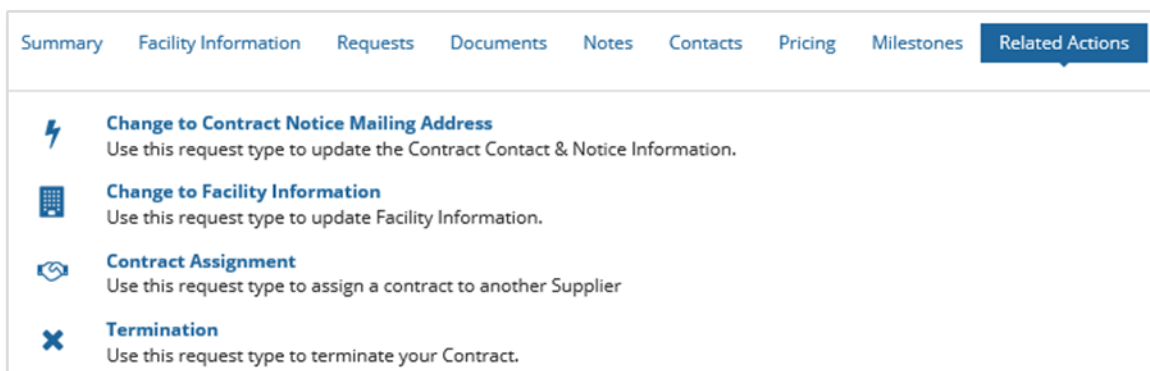


2. **Optional:** Use the filters to search for the Contract that you want to terminate.
3. Select the **Business Contract ID** to view the Contract that you want to terminate.

The screenshot shows a web interface for managing contracts. At the top, there's a blue header with 'Available Action(s)' and a button 'Submit Contract Changes'. Below this are several filter sections: 'Contract Id' (text input), 'Contract Version' (dropdown), 'LDC' (dropdown), 'Locked By' (text input), 'Lock Status' (dropdown), 'Supplier Type' (dropdown), 'Supplier Id' (text input), 'Supplier Legal Name' (text input), and 'Contract Status' (dropdown). Below the filters, there's a 'Paging' section showing '10 | 25 | 50 | Show All'. A table titled '2 Contracts' follows, with columns: Business Contract Id, Type, Status, Supplier Id, Supplier Legal Name, LDC, and Version. The table contains one row with the data: FIT-MABCDEF, microFIT, Executed, 757373, John Smith, Bluewater Power Distribution Corporation, 3.3.

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
FIT-MABCDEF	microFIT	Executed	757373	John Smith	Bluewater Power Distribution Corporation	3.3

4. Select Related Actions > Termination.



- On the **Confirm** page, select **OTHER** from the **Submission Reason** drop down menu, and then enter a comment in the **Describe Reason For Request** box.

The screenshot shows the 'Submit Termination' form with the 'Confirm' tab selected. The form displays the following information: Contract ID: FIT-MABCDEF, Supplier Type: microFIT, and Requested By: John Smith. The 'Submission Reason' dropdown menu is set to 'Please Select'. Below it is a large text area for 'Describe Reason for Request'. At the bottom, a character count shows '0 out of 4000 characters entered: 4000 remaining.'

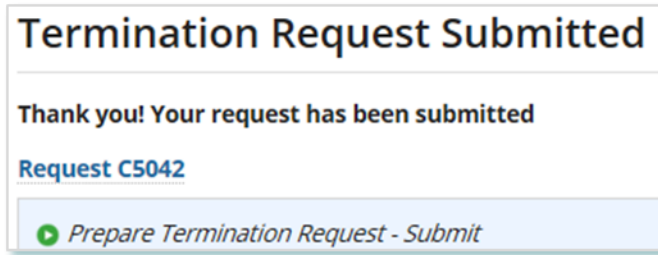
- Read through the Terms & Conditions of Termination.
- Check the box for I understand and accept the terms of the Notice of Termination.

This section contains the legal terms for contract termination. It includes two paragraphs detailing the survival of specific contract provisions upon termination for different microFIT versions. A red box highlights the checkbox labeled 'I understand and accept the terms of the Notice of Termination'.

- 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 the 'Supporting Documents' upload interface. It includes a header 'Supporting Documents [Empty - 1 Pending]', a 'Select Document to Upload' section with an 'UPLOAD' button and a 'Drop file here' area, a 'File size limit upto: 30 MB' note, a 'Document Type' dropdown menu, and a 'Description' text area. At the bottom, a character count shows '0 out of 200 characters entered: 200 remaining.' and two buttons: 'CANCEL' and 'ADD DOCUMENT'.

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

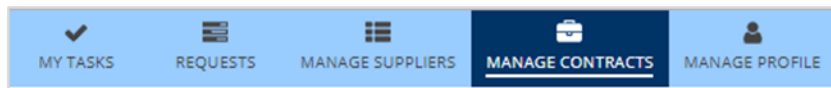
During the term of your microFIT Contract(s), there might be changes to the Contacts who manage your Supplier(s) and/or Contract(s).

The following instructions will guide you through how to Add and/or Remove Contacts from 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.






The image shows a web form titled 'Available Action(s)' with a 'Submit Contract Changes' button. Below the button are several filter sections: 'Contract Id' (text input), 'Contract Version' (dropdown), 'LDC' (dropdown), 'Locked By' (text input), 'Lock Status' (dropdown), 'Supplier Type' (dropdown), 'Supplier Id' (text input), 'Supplier Legal Name' (text input), and 'Contract Status' (dropdown). At the bottom, there is a table showing 2 contracts. The table has columns for Business Contract Id, Type, Status, Supplier Id, Supplier Legal Name, LDC, and Version. The first contract is 'FIT-MABCDEF', 'microFIT', 'Executed', '757373', 'John Smith', 'Bluewater Power Distribution Corporation', and '3.3'.

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
FIT-MABCDEF	microFIT	Executed	757373	John Smith	Bluewater Power Distribution Corporation	3.3

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.

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

-  **Change to Contract Notice Mailing Address**
Use this request type to update the Contract Contact & Notice Information.
-  **Change to Facility Information**
Use this request type to update Facility Information.
-  **Contract Assignment**
Use this request type to assign a contract to another Supplier
-  **Termination**
Use this request type to terminate your Contract.
-  **Add Contacts**

- On the **Add Contacts to Contract** page, choose a reason for submitting the change, 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**

229149 john_smith@simplemail.in

CLEAR **SEARCH**

Contact Details

Click on +ADD button to add into the queue below

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

- Choose a Role.

Selected Contacts - [1]				
Person Id	Person Name	Email Address	Role	
229149	John Smith	john_smith@simplemail.in	<div>Select Role</div> <div> Select Role Supplier Agent Supplier Approver </div>	×

CANCEL REQUEST
NEXT >

- You can add more Contacts or select **NEXT**.
- Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD

Drop file here

File size limit upto: 30 MB

Document Type *

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

Description

0 out of 200 characters entered: 200 remaining.

CANCEL

ADD DOCUMENT

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

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

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

Request Submitted

Thank you! Your request has been submitted

Request P2212

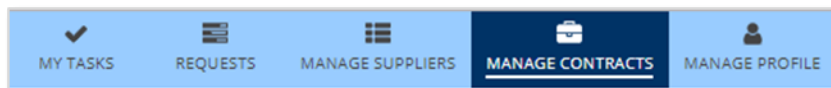
➔

Prepare Add Contact Request - Submit

Removing Supplier Contacts from a Contract

Procedure

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



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

The screenshot shows a panel titled 'Available Action(s)' with a 'Submit Contract Changes' button. Below this are several filter fields: 'Contract Id', 'Contract Version', 'LDC', 'Locked By', 'Lock Status', 'Supplier Type', 'Supplier Id', 'Supplier Legal Name', and 'Contract Status'. At the bottom, there is a table with 2 contracts.

Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name	LDC	Version
FIT-MABCEDEF	microFIT	Executed	757373	John Smith	Bluewater Power Distribution Corporation	3.3

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

The screenshot shows a panel titled 'Related Actions' with a list of request types. The 'Remove Contacts' option is highlighted at the bottom.

- Change to Contract Notice Mailing Address**
Use this request type to update the Contract Contact & Notice Information.
- Change to Facility Information**
Use this request type to update Facility Information.
- Contract Assignment**
Use this request type to assign a contract to another Supplier
- Termination**
Use this request type to terminate your Contract.
- Add Contacts**
- Remove Contacts**

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

6. Check the box(es) for the Contact(s) that you want to remove from the selected contract(s), then select **NEXT**.

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

Available Contacts

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

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

CANCEL REQUEST**NEXT >**

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

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

Request Submitted

Thank you! Your request has been submitted

Request P2212

 Prepare Remove Contact Request - Submit

Contract Request Tasks

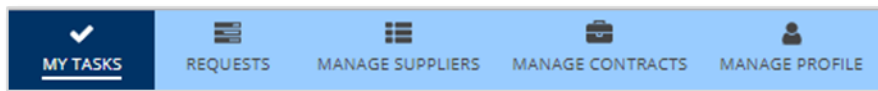
Reviewing Requests Submitted by a Supplier Approver

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

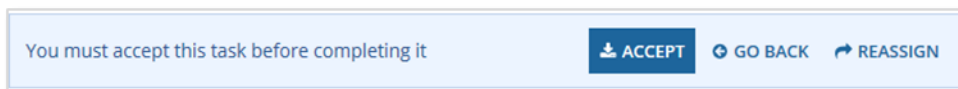
1. Select the **MY TASKS** tab.



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

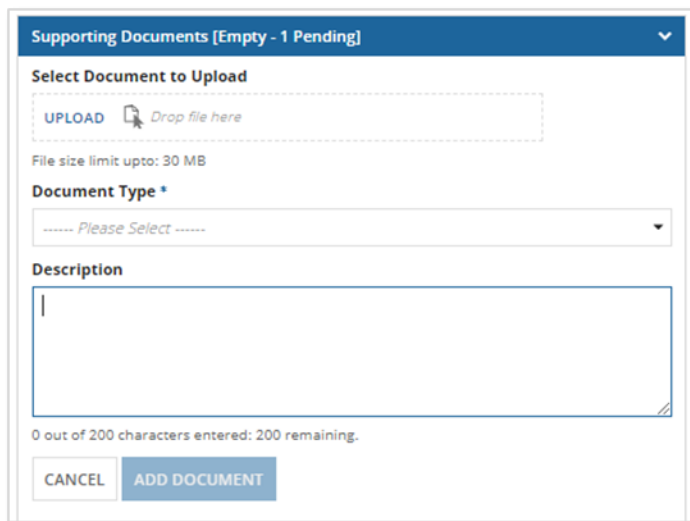
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	<input checked="" type="checkbox"/>

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



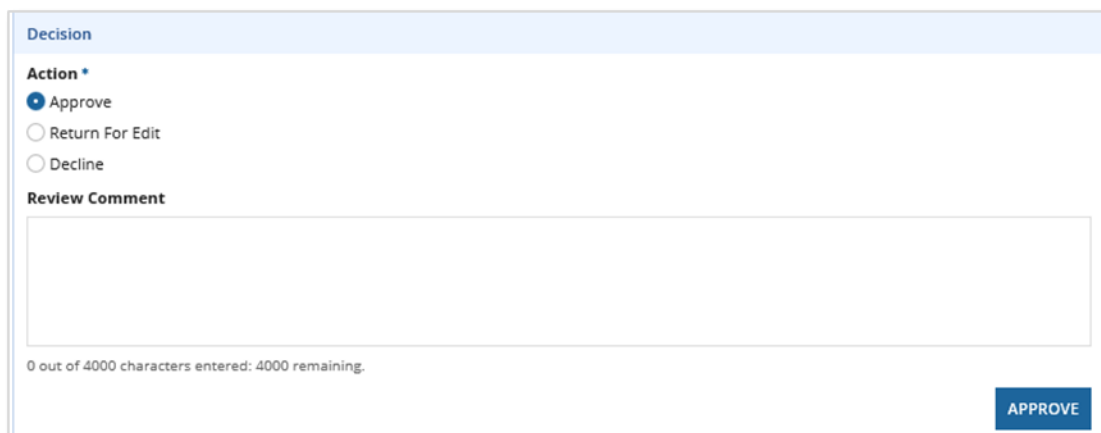
4. Review the values entered and the documents in the Request.

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



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

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



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

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

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

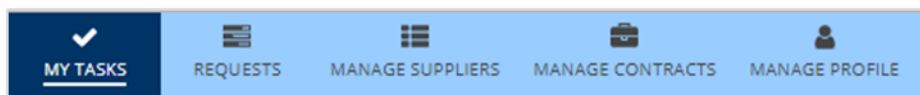
Providing Clarification for Returned Requests

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

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

Procedure

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



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

The screenshot shows a table titled 'Active Request Tasks In-Progress'. The table has columns: Request ID, Request Type, Status, Source, Active Task, and Status. A row is highlighted with a red box around the 'Active Task' column, which contains the text 'Review Returned Change Request'. A yellow arrow points from this task to a zoomed-in view of the task details below.

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

The screenshot shows a dialog box titled "Decision". It contains a section "Decision *" with two radio buttons: "Request Updated" (which is selected) and "Cancel". Below this is a text area labeled "Request Updated Comment". At the bottom left of the text area, it says "0 out of 4000 characters entered: 4000 remaining.". At the bottom right, there are two buttons: "BACK" and "REQUEST UPDATED".

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

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

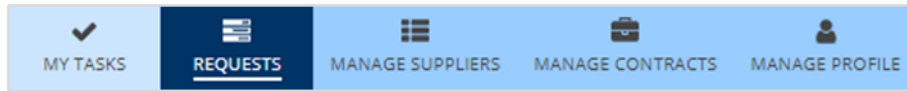
Cancelling a Submitted Request

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.

Status OPEN	Supplier ID Enter partial text to search Supplier ID
Request ID 	Contract ID Enter partial text to search Contract ID
Request Category ----- Show All -----	Prepared By ----- Show All -----
Request Type ----- Show All -----	Source ----- Show All -----
Requested From mm/dd/yyyy	Requested Thru 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		53172

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								
<div style="border: 2px solid red; padding: 2px; display: inline-block; color: white; font-weight: bold;">CLOSED</div>										
<div style="display: flex; align-items: center;"> ➤ <i>Close Request - Closed</i> </div> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%; text-align: left;">Time</th> <th style="width: 25%; text-align: left;">Performed By</th> <th style="width: 25%; text-align: left;">Role</th> <th style="width: 25%; text-align: left;">Reason</th> </tr> </thead> <tbody> <tr> <td>Jul 16, 2019 10:30 AM EST</td> <td>SYSTEM - AUTO</td> <td>IESO</td> <td></td> </tr> </tbody> </table> <p>Comment < No Comment ></p>			Time	Performed By	Role	Reason	Jul 16, 2019 10:30 AM EST	SYSTEM - AUTO	IESO	
Time	Performed By	Role	Reason							
Jul 16, 2019 10:30 AM EST	SYSTEM - AUTO	IESO								
Request - Change to Supplier Legal Name ▼										
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;"> Request ID: S3172 Request Type: Change to Supplier Legal Name Requested On: Jul 16, 2019 10:27 AM EST Requested By: John Smith Submission Reason: Changing the Legal Name of the Supplier Submission Explanation: Updating legal name </td> <td style="width: 33%; vertical-align: top;"> Supplier: ABC Joint Venture Supplier ID: 531340 Supplier Type: microFIT Legal Entity Type: Joint Venture - No Legal Personality </td> <td style="width: 33%; background-color: #ffe6e6; vertical-align: top; padding: 10px;"> <div style="border: 2px solid red; padding: 2px; display: inline-block; color: white; font-weight: bold;">Outcome: Cancelled</div> Reviewed On: Jul 16, 2019 10:30 AM EST Completed On: Jul 16, 2019 10:30 AM EST </td> </tr> </table>			Request ID: S3172 Request Type: Change to Supplier Legal Name Requested On: Jul 16, 2019 10:27 AM EST Requested By: John Smith Submission Reason: Changing the Legal Name of the Supplier Submission Explanation: Updating legal name	Supplier: ABC Joint Venture Supplier ID: 531340 Supplier Type: microFIT Legal Entity Type: Joint Venture - No Legal Personality	<div style="border: 2px solid red; padding: 2px; display: inline-block; color: white; font-weight: bold;">Outcome: Cancelled</div> Reviewed On: Jul 16, 2019 10:30 AM EST Completed On: Jul 16, 2019 10:30 AM EST					
Request ID: S3172 Request Type: Change to Supplier Legal Name Requested On: Jul 16, 2019 10:27 AM EST Requested By: John Smith Submission Reason: Changing the Legal Name of the Supplier Submission Explanation: Updating legal name	Supplier: ABC Joint Venture Supplier ID: 531340 Supplier Type: microFIT Legal Entity Type: Joint Venture - No Legal Personality	<div style="border: 2px solid red; padding: 2px; display: inline-block; color: white; font-weight: bold;">Outcome: Cancelled</div> Reviewed On: Jul 16, 2019 10:30 AM EST Completed On: Jul 16, 2019 10:30 AM EST								

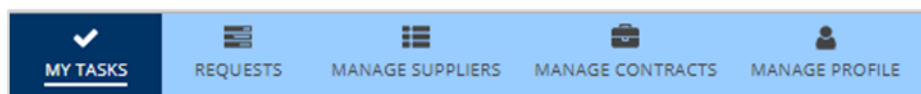
Providing Acknowledgement of a Request Outcome

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

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

Procedure

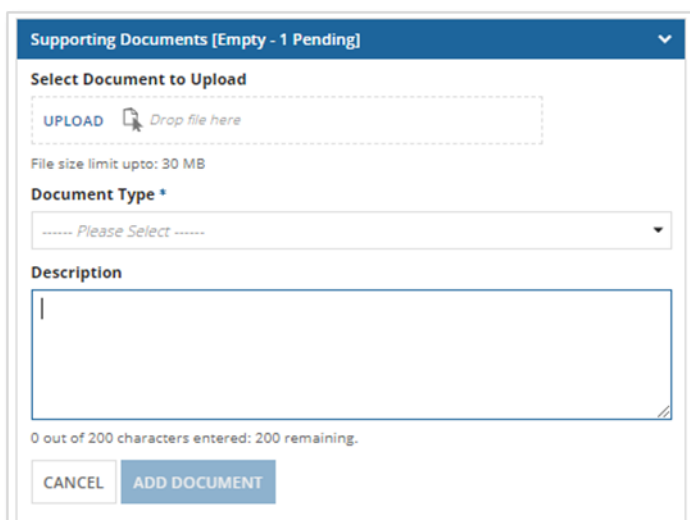
1. Select the **MY TASKS** tab.



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

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	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]' with a dropdown arrow. 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' section has a dropdown menu with 'Please Select' as the current selection. The 'Description' section has a large text area with a vertical cursor. 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.

ACKNOWLEDGED

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

Acknowledge?

NO

YES

Viewing Request Notifications

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

Procedure

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.

The screenshot shows a web interface for searching requests. It includes several filter sections: Status (set to CLOSED), Request ID (S3251), Request Category (Show All), Request Type (Show All), Supplier ID (search field), Contract ID (search field), Prepared By (Show All), Source (Show All), Final Outcome (Show All), Final Outcome Decision Date From (mm/dd/yyyy), and Final Outcome Decision Date Thru (mm/dd/yyyy). Below the filters, a table titled '1 Requests Found' displays the search results.

		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

NO

YES

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?

NO


YES

Downloading and Saving Documents

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

Procedure

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.

Download Documents

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

Document Name
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043717 - Document 2
CM -microFIT - 531340 - New Supplier Regist- New Supplier Regist- John Smith - 20190716043731 - Document 1

DONE

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

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

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

NO **YES**

Additional Resources

Additional resources can be found at the following links:

microFIT Homepage: [microFIT Overview \(ieso.ca\)](https://microFIT.ieso.ca/)

**Independent Electricity
System Operator**

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Toronto, Ontario M5H 1T1

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ieso.ca



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