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# Beacon microFIT Supplier

Digital User Guide  
Contract Assignments



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# Getting Started

## Disclaimer

Information on the IESO website 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 the IESO website and the microFIT Contract or microFIT Rules, the microFIT Contract or microFIT Rules, as applicable, will prevail. Nothing on this website shall be binding on the IESO. The IESO reserves the right to modify or amend the information on the IESO website at any time and without notice.

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## 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	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.

**Only the Supplier Approver can submit or review requests to the IESO and are responsible for the management of the microFIT Contract.**

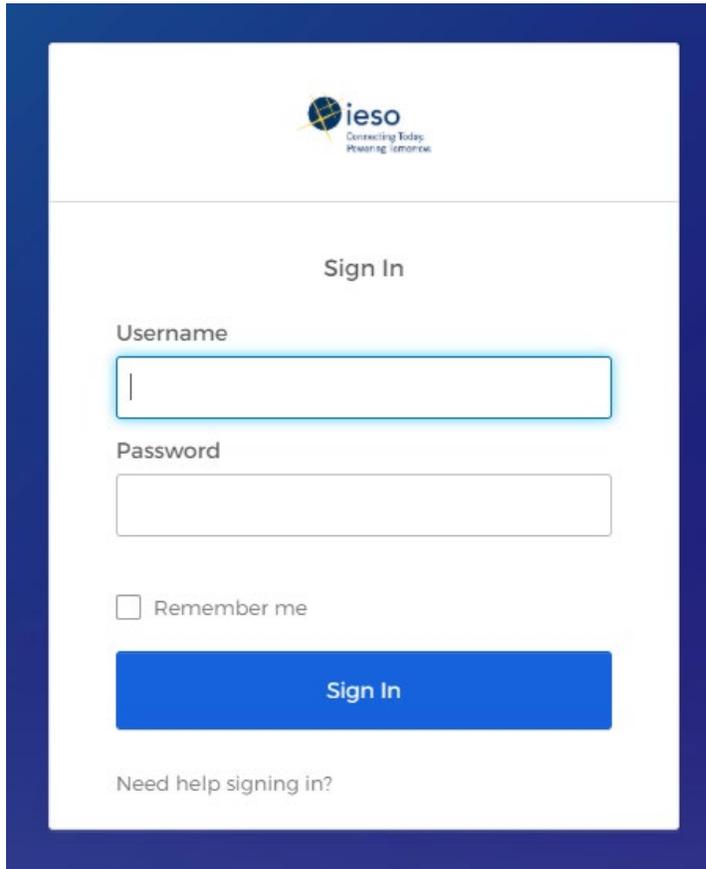
Role	Description
Supplier Agent	<p>The Supplier Agent is an optional role assigned by the Supplier Approver in relation to a microFIT Contract. When assigned to a microFIT Contract, a Supplier Agent can view the microFIT Contract and related information and prepare certain types of requests for review and approval by a Supplier Approver.</p> <p><b>A Supplier Agent's actions must be reviewed and approved by a Supplier Approver before being submitted to the IESO.</b></p>
IESO	<p>The IESO is represented by the Contract Management team that reviews, approves and/or rejects requests submitted by the Supplier Approver to the IESO. The IESO can also initiate certain requests that are to be reviewed by the Supplier Approver.</p>

## Sign in to Beacon

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

### Procedure

1. Go to [IESO Gateway - Sign In](#)
2. Enter your account username (your email address) and password



The screenshot shows the IESO Sign In page. At the top left is the IESO logo with the tagline "Connecting Today. Powering Tomorrow." Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". The "Username" field is highlighted with a blue glow. Below the "Password" field is a checkbox labeled "Remember me". At the bottom of the form is a blue button labeled "Sign In". Below the button is a link that says "Need help signing in?"

3. If you have set up multiple factors, you can choose which factor you will verify to login. Switch between factors by selecting the drop-down menu arrow next to the authentication icon. Please be aware that you are only required to verify one factor to login.

ieso  
Connecting Today.  
Powering Tomorrow.

SMS

SMS Authentication  
(+1 XXX-XXX-XXXX)

Enter Code

Send code

Do not challenge me on this device again

Verify

[Back to sign in](#)

4. Once you have selected your factor, you will be prompted to provide the answer to your Security Question or your SMS/Voice Call Code. Type in the answer or code and click "Verify". **Please be aware that the answer is case sensitive.**

ieso  
Connecting Today.  
Powering Tomorrow.

?

Security Question

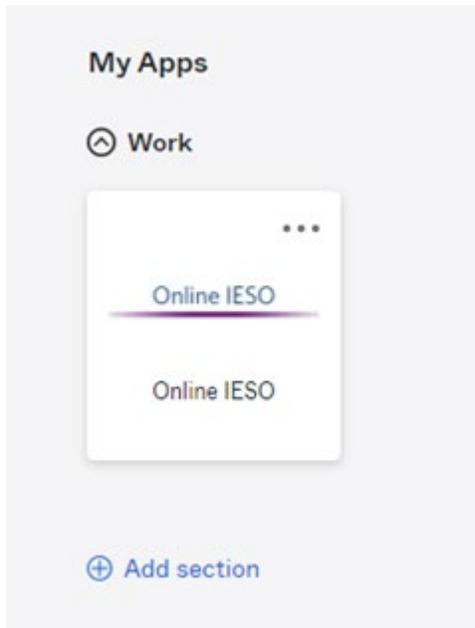
What is the food you least liked as a child?

Do not challenge me on this device again

Verify

[Back to sign in](#)

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



6. Next you will be brought to the Available Programs dashboard. Select the **FIT-microFIT 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.

<p><b>FIT-microFIT Program</b></p>  <p><b>Click here to enter Beacon</b></p> <p><i>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.</i></p>	<p><b>Industrial Energy Efficiency Program</b></p>  <p><b>Register for Industrial Energy Efficiency Program</b></p> <p><i>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.</i></p>	<p><b>Retrofit</b></p>  <p><b>Register for Retrofit</b></p> <p><i>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.</i></p>
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# 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 interface. At the top, there is a navigation bar with tabs for 'MY TASKS', 'REQUESTS', 'MANAGE SUPPLIERS', 'MANAGE CONTRACTS' (selected), and 'MANAGE PROFILE'. Below the navigation bar is a section for 'Available Action(s)'. The main area contains several filter fields: '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 is a 'Paging: 10 | 25 | 50 | Show All' section. A table displays '2 Contracts' with the following data:

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** 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-MABCDEF**

<b>Contract Status:</b> Executed	<b>Contract Notice Mailing Address</b>
<b>Contract Id:</b> FIT-MABCDEF	120 Adelaide Toronto, Ontario L0B 1B0 Canada.
<b>Contract Version:</b> 1.3	
<b>Contract Type:</b> microFIT	<b>Facility Address</b>
<b>Nameplate Capacity (KW):</b> 10	120 Adelaide Street West, Toronto, Ontario X1X 2X2 Canada.
<b>Contract Price:</b> 80.2	
<b>Supplier Legal Name:</b> John S Smith	
<b>Supplier Id:</b> 662121	
<b>LDC:</b> Hydro One Networks Inc.	

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

# Managing Assignment Requests

## Contract Assignment Requests

During the lifecycle of your microFIT Contract(s), there might be changes to the ownership of the project. After the prospective owner (the "Assignee") has registered a new Supplier, the current Supplier (the "Assignor") can submit a Contract Assignment Request. Once a Contract Assignment Request has been initiated by the Assignor, the Assignee must also complete certain actions in Beacon.

Once both the Assignor and Assignee have completed their respective tasks and the Contract Assignment Request has been submitted, it will be reviewed by the IESO. The following instructions will guide you through how to complete a Contract Assignment Request in Beacon.

### **Before you begin**

Before a Supplier can assign a microFIT Contract, the following conditions must be completed:

- The Assignee must register for a Beacon account and register a Supplier.
- The Assignee must provide their Supplier ID and Supplier Legal Name to the Assignor.
- The Assignee must set-up a generator account with their Local Distribution Company.
- The Assignor must assign their Connection Agreement to the Assignee.
- The Assignee must be an Eligible Participant, as defined in the Eligible Participant Schedule.

Also, be sure to download any applicable Contract documents you would like to retain for your records, as these will no longer be available to you as the Assignor once the Contract Assignment Request is complete. Please refer to the Downloading and Saving Documents section at the end of this document for further details.

### **Related Topics**

- To register a Supplier, check out *Registering a New Supplier*.

## Initiating a Contract Assignment Request (Assignor)

### Procedure

**Note:** Be sure to download any applicable Contract documents you would like to retain for your records, as these will no longer be available to you as the Assignor once the Contract Assignment Request is complete. Please refer to the Downloading and Saving Documents section at the end of this document for further details.

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



2. **Optional:** Use the filters to find a Contract that you want to initiate the Contract Assignment Request for.

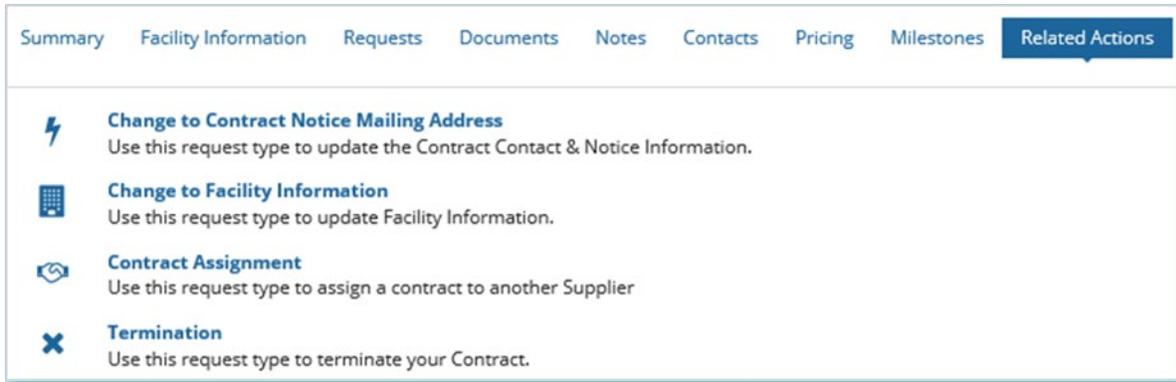
<b>Contract Id</b> <input type="text" value="Enter partial text to search Contract Id"/>	<b>Supplier Type</b> ----- Show All -----
<b>Contract Version</b> ----- Show All -----	<b>Supplier Id</b> <input type="text" value="Enter partial text to search Supplier Id"/>
<b>LDC</b> ----- Show All -----	<b>Supplier Legal Name</b> <input type="text" value="Enter partial text to search Supplier Legal Name"/>
<b>Locked By</b> <input type="text" value="Request Id or DRAFT"/>	<b>Contract Status</b> ----- Show All -----
<b>Lock Status</b> ----- Show All -----	

Paging: 10 | 25 | 50 | Show All

3. Select the **Business Contract ID** to view the Contract that you want to assign.

	Business Contract Id	Type	Status	Supplier Id	Supplier Legal Name
	FIT-MABCDEF	microFIT	Executed	757373	John Smith

4. Select Related Actions > Contract Assignment.



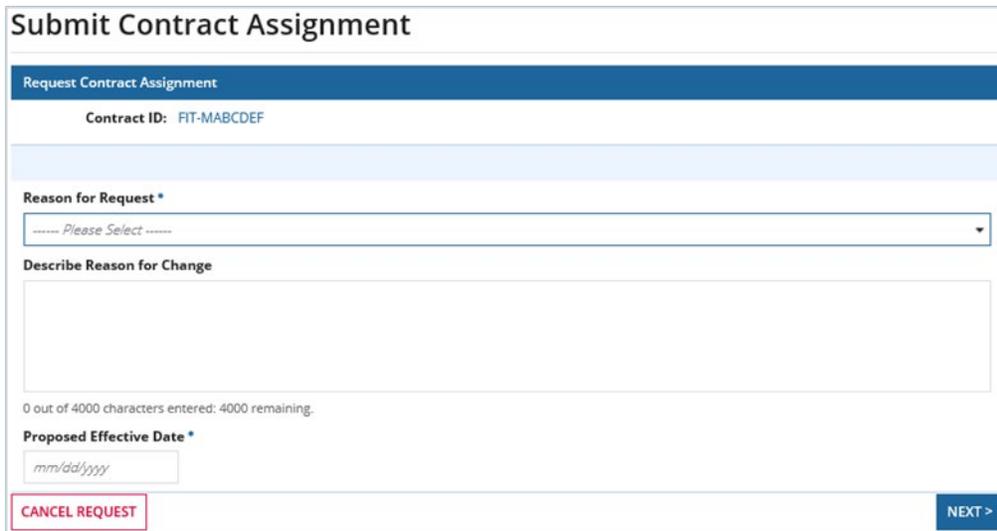
The screenshot shows a navigation bar with tabs: Summary, Facility Information, Requests, Documents, Notes, Contacts, Pricing, Milestones, and Related Actions. The 'Related Actions' tab is active and displays a list of four actions:

- 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.

5. Choose a reason for the Request, and then enter the reason for submitting the change.

6. Choose a proposed effective date, and then select **NEXT**.

**Note:** The proposed effective date must be a present or future date.



The screenshot shows the 'Submit Contract Assignment' form. At the top, it says 'Request Contract Assignment' and 'Contract ID: FIT-MABCDEF'. Below this, there is a dropdown menu for 'Reason for Request \*' with the text '----- Please Select -----'. Underneath is a text area for 'Describe Reason for Change' with a character count: '0 out of 4000 characters entered: 4000 remaining.' Below the text area is a date field for 'Proposed Effective Date \*' with the format 'mm/dd/yyyy'. At the bottom left is a 'CANCEL REQUEST' button and at the bottom right is a 'NEXT >' button.

7. Verify the Supplier and Person information on the Verify Assignor Information page. If the information is correct, select **Y**. If the information is incorrect, select **CANCEL REQUEST**, and then correct the information before you proceed with the Contract Assignment Request.

**Note:** You must confirm that the information is correct to continue.

### Verify Supplier Information

I, John Smith, certify that the information below is correct [CONFIRMED] \*

Y  N

John Smith [microFIT-757373] [CONFIRMED]

<b>Supplier Legal Name:</b> John Smith	<b>GST/HST Registrant?</b> <input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Supplier Id:</b> 757373	
<b>Supplier Type:</b> microFIT	
<b>Legal Entity Type:</b> Individual	
<b>Non-Resident of Canada?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	

### Verify Person Information

I, John Smith, certify that the information below is correct [CONFIRMED] \*

Y  N

John Smith [CONFIRMED]

<b>Person Name:</b> John Smith	<b>Address</b>
<b>Person Id:</b> 959137	44 North St.
<b>Account Id:</b> john.smith@yopmail.com	Wawa, Ontario N1N 1N1
	Canada
	<b>Main Phone</b>
	(416) 967-1111
	<b>Primary Email</b>
	John.Smith@yopmail.com

**CANCEL REQUEST** **NEXT >**

8. Select **NEXT**.

- Verify the Contract information on the Verify Contract Information page. If the information is correct, select Y. If the information is incorrect, select **CANCEL REQUEST**, and then correct the information before you proceed with the Contract Assignment Request.

**Note:** You must confirm that the information is correct to continue.

Verify Contract Information

I, John Smith, certify that the information below is correct [CONFIRMED] \*

Y  N

Contract Notice Address [CONFIRMED]

Address

88 Gadr st.  
Kabul 65465  
Afghanistan

CANCEL REQUEST

< BACK NEXT >

- Select **NEXT**.

- On the Identify Assignee page, enter the Supplier ID and Supplier Legal Name for the Supplier you want to assign the Contract to, and then select **FIND SUPPLIER**.

**Note:** The Assignee must be a verified Supplier.

The Supplier ID and Supplier Legal Name should be provided to you directly from the Assignee. The Assignee is provided with a Supplier ID once they have completed the Supplier Registration process.

The Assignee's Supplier ID# and Supplier Legal Name must be entered EXACTLY as it appears on the Assignee's Beacon account. Be mindful that any extra spaces or characters will prevent the tool from finding the Assignee.

## Submit Contract Assignment

Verify Assignor Information    Verify Contract Information    Identify Assignee    Review

Contract FIT-MFTHPKJ

Contract Status: Executed

Contract Version: 1

Nameplate Capacity (kW): 1000

Supplier Legal Name: Hydro Limited

LDC: Hydro Limited

LDC Generator Account Name: Hydro Limited

LDC Generator Account No: 1000

Load Account Name: Hydro Limited

Load Account No: 1000

Facility Name: R-12

Contract Notice Mailing Address

Facility Address

Identify Assignee

Supplier Id: 700

Supplier Legal Name: Ali

FIND SUPPLIER

Supplier Overview

Supplier Legal Name: Ali

Supplier Id: 700

Supplier Type: microFIT

Legal Entity Type: Individual

CANCEL REQUEST

< BACK NEXT >

12. Select **NEXT**.

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

13. Ensure to check off all acknowledgments before completing the request.

14. Select **SUBMIT REQUEST**.

**Please Acknowledge: \***

This Contract Assignment request is being submitted by me, and not by any third party representative on my behalf.

I am solely responsible for checking email messages and automated notifications from the IESO sent in relation to this Contract Assignment request.

I will notify the IESO of any breach of the representations and warranties made in the Contract Assignment, including any unauthorized access to my email address or access Credentials.

If you are ready to submit the Assignment Request, check this box and click the Submit Assignment Request button below. By checking this box and submitting this Assignment Request, I hereby declare that the information contained in this document and submitted to the IESO is true, complete and accurate.

By checking this box and submitting this Assignment Request, I hereby declare that the Connection Agreement has been transferred by me to the person to which contract is to be assigned.

I have read and understood the IESO's privacy policy (found at [www.ieso.ca](http://www.ieso.ca)), and I consent to the collection, use and disclosure of my personal information as set out in the privacy policy. I represent and warrant to the IESO that, if I have disclosed a third party's personal information, including the personal information of the Assignor or Assignee, as applicable, I have the consent of the third party to disclose the personal information to the IESO.

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

**Contract Assignment Request Submitted**

Thank you! Your request has been submitted

[Request C4267](#)

[Prepare Assignment Request - Submit](#)

#### Related Topics

- To update incorrect or inaccurate information for you, check out *Changing Your Contact Information*.
- To update incorrect or inaccurate information for a Supplier, check out *Submitting a Request to Change a Supplier Record*.
- To update incorrect or inaccurate information on a Contract, check out *Submitting a Request to Change a Contract Record*.

## Completing a Contract Assignment Request (Assignee)

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 **Confirm Contract Assignment** for the Request that you want to review. This brings you to the **Request Information** page

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
C4267	Contract Assignment	[DRAFT]	Supplier	Confirm Contract Assignment	<input checked="" type="checkbox"/>

3. Review the information, write down the **Contract ID#**, and then select **NEXT**.

- Verify the Supplier and Person information on the Verify Assignee Information page. If the information is correct, select **Y**. If the information is incorrect, select **DECLINE ASSIGNMENT**, and then correct the information before you proceed with the Contract Assignment Request.

**Note:** You must confirm that the information is correct to continue.

The screenshot displays a web interface for 'Verify Assignee Information'. At the top, a navigation bar includes 'Request Information', 'Verify Assignee Information' (active), 'Enter Assignee Contract Information', 'Verify Requirements', 'Upload Supporting Documents', and 'Review'. Below this, the 'Verify Supplier Information' section is highlighted. It contains a confirmation prompt: 'I, John Smith, certify that the information below is correct \*' with radio buttons for 'Y' and 'N'. The supplier details are: John Smith [microFIT-757373], Supplier Legal Name: John Smith, Supplier Id: 757373, Supplier Type: microFIT, Legal Entity Type: Individual, GST/HST Registrant? (Yes selected), and Non-Resident of Canada? (No selected). The 'Verify Person Information' section follows, with a similar confirmation prompt. The person details are: John Smith, Person Name: John Smith, Person Id: 959137, Account Id: john.smith@yopmail.com, Address: 44 North St., Wawa, Ontario N1N 1N1, Canada, Main Phone: (416) 967-1111, and Primary Email: John.Smith@yopmail.com. At the bottom, there is a 'DECLINE ASSIGNMENT' button on the left and '< BACK' and 'NEXT >' buttons on the right.

- Select **NEXT**.

6. On the **Enter Assignee Contract Information** page, enter your generator account information, facility name, and Contract notice mailing address.

**Note:** You must contact your Local Distribution Company and request to set up a new generator account, which is different from a consumption (load) account.

The screenshot shows a web form titled "Enter Assignee Contract Information" with a navigation bar at the top containing: Request Information, Verify Assignee Information, Enter Assignee Contract Information (active), Verify Requirements, Upload Supporting Documents, and Review. The form fields are as follows:

- Bluewater Power Distribution Corporation Generator Account Name \***: Text input field with placeholder "Enter your Supplier Legal Name". Below it, a note states: "This should be the Supplier Legal Name - 'John Smith'".
- Bluewater Power Distribution Corporation Generator Account No \***: Text input field.
- Facility Name \***: Text input field.
- Contract Notice Mailing Address** (Section Header):
  - Street Address \***: Text input field with placeholder "e.g. 120 Adelaide Street West, P.O. box".
  - Additional Mailing Information (optional)**: Text input field with placeholder "Apartment, suite, unit, rural route, c/o".
  - Country \***: Dropdown menu with placeholder "Select Country".
  - City \***: Text input field.
  - Postal Code \***: Text input field.

At the bottom right of the form, there are two buttons: "< BACK" and "NEXT >".

7. Select **NEXT**.

8. On the **Verify Requirements** page, confirm that the Assignee requirements have been met. If required pre-conditions aren't met, complete all of the pre-conditions before you proceed with the Contract Assignment Request.

SAVE DRAFT

### Confirm Contract Assignment Information

Request Information    Verify Assignee Information    Enter Assignee Contract Information    **Verify Requirements**    Upload Supporting Documents    Review

Assignee Requirements	Requirement Met?	
Assignee Is an Eligible Participant	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED
Parcel Register or Land Transfer Document	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED
Set-up Generator Account with LDC	<input type="radio"/> Yes <input type="radio"/> No	REQUIRED

Requirements contained in the FIT/microFIT Contract and applicable FIT/microFIT Rules must be satisfied for contract assignments. Please refer to the Review Page for representations and warranties required to submit this assignment request.

< BACK    NEXT >

> Task History

9. 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.

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 submit a Contract Assignment Request, you might be required to submit certain documentation as evidence of certain information (e.g. prescribed forms, parcel register, land transfer documents, etc.).

11. On the **Review** page, you will find two Acknowledgement sections. Please read them carefully and complete accordingly.

**Please acknowledge your Authority: \***

If this request is being submitted by a NATURAL PERSON: I am the prospective new Supplier (the "Assignee"). This Contract Assignment request is being submitted by me, on my own behalf and in my own name, and not by any third party representative on my behalf; or

If this request is being submitted by a NON-NATURAL PERSON: I am the president, officer or director of the Assignee and I have the authority to legally bind the Assignee.

**Please acknowledge: \***

I have not provided access to my "BEACON" account to any other person.

I am solely responsible for completing the assignee portion of the Contract Assignment request and agree that the request may be cancelled if the request is not completed by the due date listed in Beacon.

I acknowledge that I have read and understand the Beacon Terms of Use available on the "BEACON" account associated with this assignment request.

I will notify the IESO of any breach of the representations and warranties made in the Contract Assignment, including any unauthorized access to my access Credentials.

By checking this box and submitting the Assignment Request, I hereby declare that the Connection Agreement has been transferred to me by the current microFIT Supplier.

By checking this box and submitting the Assignment Request, I hereby declare that the information contained in this document and submitted to the IESO is true, complete and accurate.

I have read and understood the IESO's Privacy Policy (found at [www.ieso.ca](http://www.ieso.ca)), and I consent to the collection, use and disclosure of my personal information as set out in the Privacy Policy. I represent and warrant to the IESO that, if I have disclosed a third party's personal information, including the personal information of the Assignor or Assignee, as applicable, I have the consent of the third party to disclose the personal information to the IESO.

Each Assignee has read and understood the microFIT Rules and the microFIT Contract. Each Assignee declares that it has prepared and carefully reviewed this Assignment Request and that the information contained in or submitted with this Assignment Request is true, complete and accurate in all respects and that the Assignment Request satisfies all microFIT eligibility requirements including: a. Each Assignee is an Eligible Participant pursuant to the microFIT Eligible Participant Schedule.b. If the Assignee is an Individual or Farmer, the Assignee has only one microFIT Project and does not have multiple Applications active at the time of this Assignment Request in accordance with the microFIT Rules.

The Assignee(s) acknowledge(s) the collection, use and disclosure/sharing of information as set out in Section 6.2 of the microFIT Rules, and consent(s) to such collection, use and disclosure/sharing of information as described in Section 6.2 of the microFIT Rules.

**Decision**

Approve

Decline

Return for Edit

**Comment**

12. Under the **Decision** section, choose either **Approve** or **Decline**.

- a. If you select **Approve**, you can enter an explanatory note or comment to provide additional context to the Contract Assignment Request, and then select **SUBMIT REQUEST**.
- b. If you select **Decline**, you can enter an explanatory note or comment to provide additional context to the Contract Assignment Request, and then select **DECLINE**.

**Decision**

**Decision**

Approve

Decline

**Comment**

0 out of 4000 characters entered: 4000 remaining.

< BACK

Once the Request is submitted, a confirmation page is displayed. The Request is now under IESO review. Please wait for further instructions from the IESO.

Related Topics

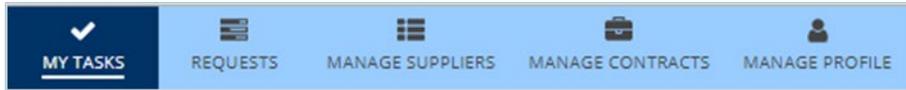
- To update incorrect or inaccurate information for you, check out *Changing Your Contact Information*.
- To update incorrect or inaccurate information for a Supplier, check out *Submitting a Request to Change a Supplier Record*.

## Execute Novation Agreement for a Contract Assignment Request (Assignee/Assignor)

Once the Assignor and Assignee have completed their tasks and the IESO has reviewed the submitted Contract Assignment Request and determined that requirements have been met and the assignment can proceed, a Contract Novation Agreement will be generated for the Assignor and the Assignee to review and accept.

### Procedure

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

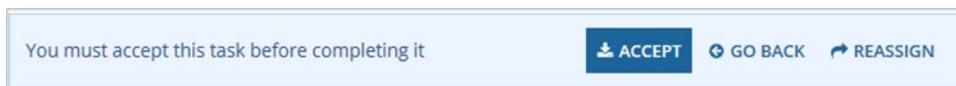


2. Select **Execute Agreement [Assignee/Assignor]** for the Request that you want to review.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
C6057	Contract Assignment	IESO Review	Supplier	Execute Agreement [Assignee]	<input checked="" type="checkbox"/>

This brings you to the Execute Assignee/Assignor Agreement for Contract Assignment page.

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



- To review all relevant information including the generated Novation Agreement, select **View Novation Agreement**.
- Once you have reviewed the Novation Agreement and have chosen to accept the Contract Assignment, select **Execute Agreement – Assignee/Assignor**. Please carefully review and check off all of the acknowledgement statements in order to proceed.

Decision

**Decision**

Execute Agreement - Assignee

Decline Agreement

[View Novation Agreement](#)

**Please Acknowledge: \***

I have read and understood the terms and conditions of the microFIT Contract Assignment.

I attest that all the information in this microFIT Contract Assignment Agreement is true and accurate.

I understand my obligations as an Assignor/Assignee.

I accept the terms and conditions of the microFIT Contract.

I have read and understood the IESO's privacy policy (found at [www.ieso.ca](http://www.ieso.ca)), and I consent to the collection, use and disclosure of my personal information as set out in the privacy policy.

I represent and warrant to the IESO that, if I have disclosed a third party's personal information, including the personal information of the Assignor or Assignee, as applicable, I have the consent of the third party to disclose the personal information to the IESO.

**Note:** Be sure to complete all acknowledgments in order to continue.

- Select **Execute Agreement - Assignee [Assignor]**.

I, Thomas Russell, have reviewed the agreement and provided all relevant documentation

**EXECUTE AGREEMENT - ASSIGNEE**

- Once both the Assignor and Assignee have individually completed the Execute Agreement task, it is returned to the IESO for a final review. If no further action is required, you will receive a notification from the IESO that provides the final outcome of the Request.

# Contract Assignment Request Tasks

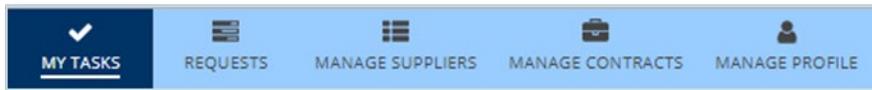
## Reviewing Requests Submitted by a Supplier Approver

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.

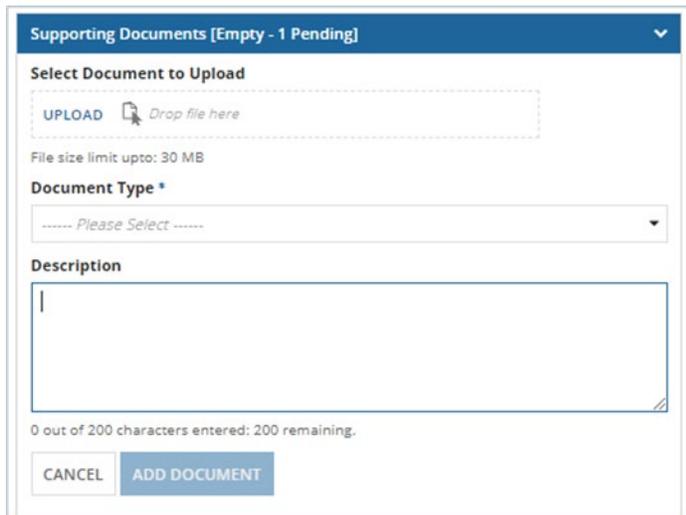
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	

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



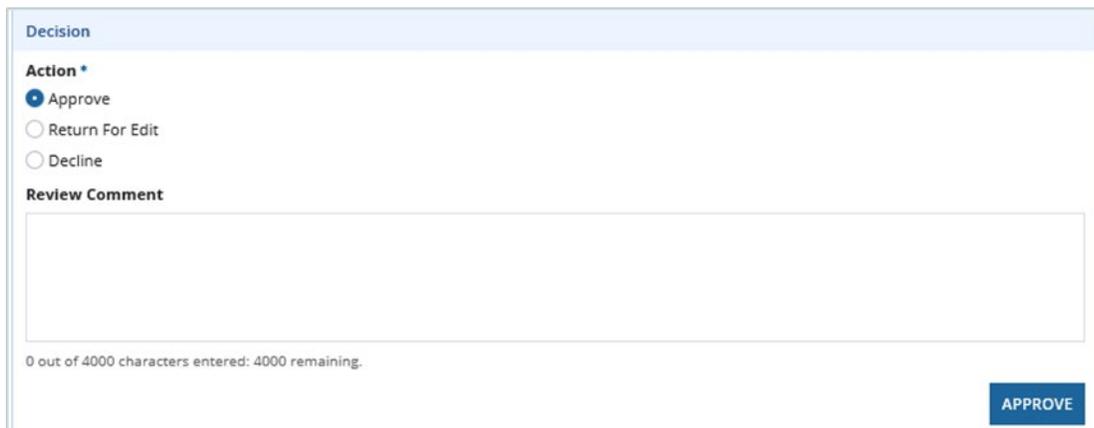
4. Review the values entered and the documents in the Request.

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.



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" instruction. Below this is a "File size limit upto: 30 MB" note. The "Document Type" is selected via a dropdown menu showing "----- Please Select -----". A "Description" text area is present, with a character count at the bottom: "0 out of 200 characters entered: 200 remaining." At the bottom of the form are "CANCEL" and "ADD DOCUMENT" buttons.

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



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

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

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

## Providing Clarification for Returned Requests

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

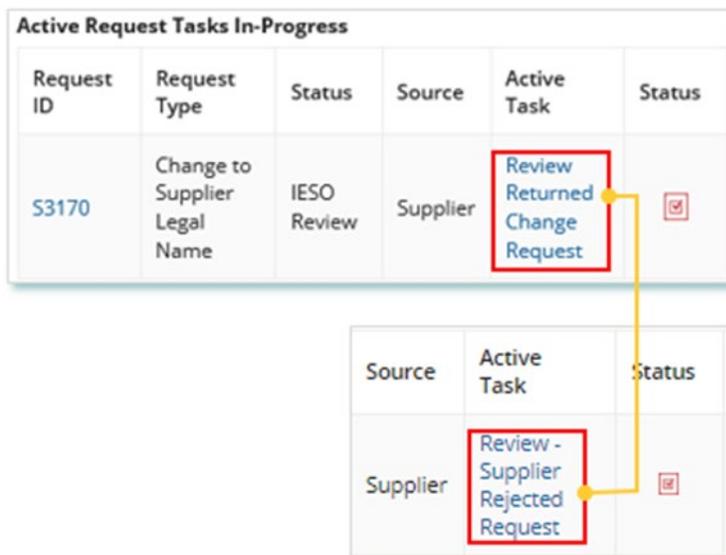
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

### Procedure

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



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



The image shows a table titled "Active Request Tasks In-Progress". The table has six columns: Request ID, Request Type, Status, Source, Active Task, and Status. A red box highlights the "Review Returned Change Request" task in the Active Task column. 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	

Source	Active Task	Status
Supplier	Review - Supplier Rejected Request	

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**.

**Decision**

**Decision \***

Request Updated

Cancel

**Request Updated Comment**

0 out of 4000 characters entered: 4000 remaining.

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

Acknowledge?

## Canceling a Submitted Request

You can cancel a Request that you submitted.

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

### Procedure

1. Select the **Requests** tab.



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

<b>Status</b> OPEN	<b>Supplier ID</b> <i>Enter partial text to search Supplier ID</i>
<b>Request ID</b> 	<b>Contract ID</b> <i>Enter partial text to search Contract ID</i>
<b>Request Category</b> ----- Show All -----	<b>Prepared By</b> ----- Show All -----
<b>Request Type</b> ----- Show All -----	<b>Source</b> ----- Show All -----
<b>Requested From</b> <i>mm/dd/yyyy</i>	<b>Requested Thru</b> <i>mm/dd/yyyy</i>
<b>7 Requests Found</b>	

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

1 Requests Found		
		Request ID
OPEN		S3172

4. Select CANCEL REQUEST.

Supplier Request [S3172] CANCEL REQUEST

Summary Attachments Related Actions

Submitted IESO Review Closed

OPEN

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

### Confirm Cancellation of Request S3172

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

**➤ Prepare Change Request - Submit**

Time	Performed By	Role	Reason
Jul 16, 2019 10:27 AM EST	John Smith	Supplier Approver	Changing the Legal Name of the Supplier

**Comment**  
Updating legal name

**Request - Change to Supplier Legal Name** >

**Describe Reason for Cancelling Request \***

0 out of 4000 characters entered: 4000 remaining.

BACK CANCEL REQUEST

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

Are you sure?

NO YES

8. Refresh your page.

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

Submitted IESO Review Closed

**CLOSED**

**Close Request - Closed**

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

**Comment**  
< No Comment >

**Request - Change to Supplier Legal Name**

<b>Request ID:</b> 53172	<b>Supplier:</b> ABC Joint Venture	<b>Outcome:</b> <b>Cancelled</b>
<b>Request Type:</b> Change to Supplier Legal Name	<b>Supplier ID:</b> 531340	<b>Reviewed On:</b> Jul 16, 2019 10:30 AM EST
<b>Requested On:</b> Jul 16, 2019 10:27 AM EST	<b>Supplier Type:</b> microFIT	<b>Completed On:</b> Jul 16, 2019 10:30 AM EST
<b>Requested By:</b> John Smith	<b>Legal Entity Type:</b> Joint Venture - No Legal Personality	
<b>Submission Reason:</b> Changing the Legal Name of the Supplier		
<b>Submission Explanation:</b> Updating legal name		

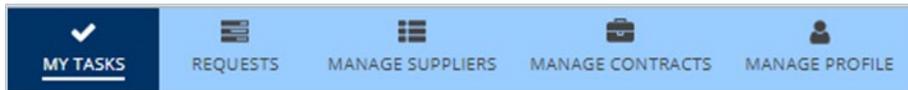
## Providing Acknowledgement of a Request Outcome

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

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

Procedure

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

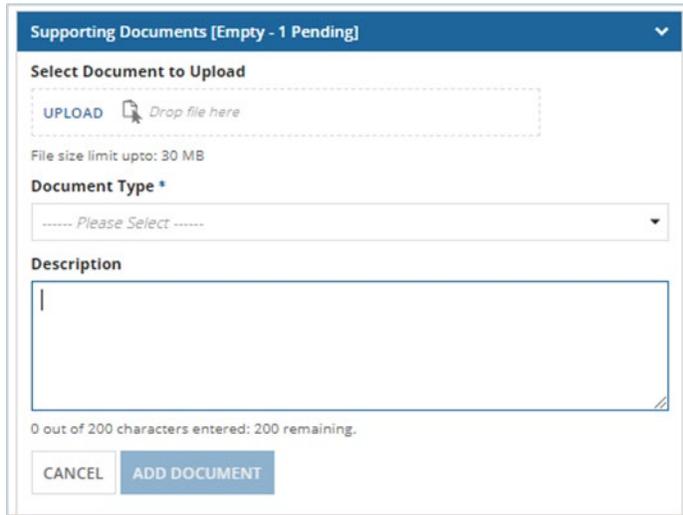


2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	<a href="#">Provide Acknowledgement</a>	

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.



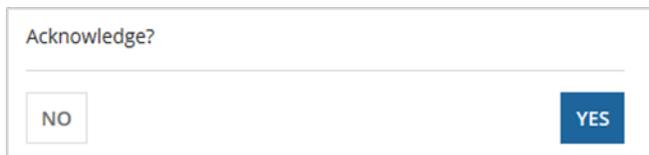
The screenshot shows a form titled "Supporting Documents [Empty - 1 Pending]". It includes a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" area. Below this is a "File size limit upto: 30 MB" note. The "Document Type" is selected via a dropdown menu showing "Please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

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



The screenshot shows a form with the heading "Provide feedback or comments below as necessary (If issues, please document below and submit a separate request):". It features a large text area for input, with a character count of "0 out of 4000 characters entered: 4000 remaining." A blue "ACKNOWLEDGED" button is located at the bottom right.

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



The screenshot shows a dialog box titled "Acknowledge?". It contains a horizontal line for input and two buttons: "NO" and "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 search interface with various filters. The 'Status' dropdown is highlighted with a red box and set to 'CLOSED'. Other filters include Request ID (S3251), Request Category (Show All), Request Type (Show All), Supplier ID, Contract ID, Prepared By, Source, and Final Outcome Decision Date From/Thru. Below the filters, a table shows 1 request found.

Request ID	Request Type	Requested	Requested By	Prepared By	Supplier ID	Final Outcome Decision Date	Final Outcome Decision By
CLOSED <span style="color: red;">×</span> 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.

A close-up of the table from the previous screenshot, showing the details of the single request found.

Request ID	Request Type	Requested
CLOSED <span style="color: red;">×</span> 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.

The screenshot shows the 'Message To Supplier' tab selected. The notification title is 'Notification to Supplier [Change to Supplier Resident Status]'. The message content is as follows:

Dear John Smith,

The Change to Supplier Resident Status (Request ID #S3251 ) 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.

The screenshot shows the 'Attachments' tab selected. The interface includes a table of documents and two buttons: 'DOWNLOAD DOCUMENT' and 'CLEAR SELECTION'.

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**.

The dialog box contains the following text and buttons:

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

9. Refresh your page.

10. Select DOWNLOAD DOCUMENTS.

Download Documents	
<b>Note:</b> Click on any available links below to view document task	
Task Name	Created On
Download Documents	7/25/2019 10:49 AM EST

11. Select a document name to begin downloading it.

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

### Download Documents

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

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

**DONE**

12. Select **DONE**.

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

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

## Downloading and Saving Documents

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

### Procedure

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

	Supplier ID
	531340

3. Select the **Documents** tab.

Summary	Requests	Contracts	Notes	<b>Documents</b>	Contacts	Related Actions
---------	----------	-----------	-------	------------------	----------	-----------------

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

Summary	Requests	Contracts	Notes	<b>Documents</b>	Contacts	Related Actions
<b>Request ID</b>	<input type="text" value="Enter partial text to search for Request Id"/>	<b>Document Type</b>	<input type="text" value="----- Please Select -----"/>			
<b>Document Name</b>	<input type="text" value="Enter partial text to search for Document Name"/>	<b>Document Description</b>	<input type="text" value="Enter partial text to search for description"/>			
<b>IESO Document Name</b>	<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
<a href="#">Download Documents</a>	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?

## Additional Resources

Additional resources can be found at the following links:

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

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**Independent Electricity  
System Operator**

1600-120 Adelaide Street West  
Toronto, Ontario M5H 1T1

E-mail: [microFIT.contract@ieso.ca](mailto:microFIT.contract@ieso.ca)

**ieso.ca**

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

 [facebook.com/OntarioIESO](https://facebook.com/OntarioIESO)

 [linkedin.com/company/IESO](https://linkedin.com/company/IESO)