



Beacon microFIT Supplier

Digital User Guide
Person Management



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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.

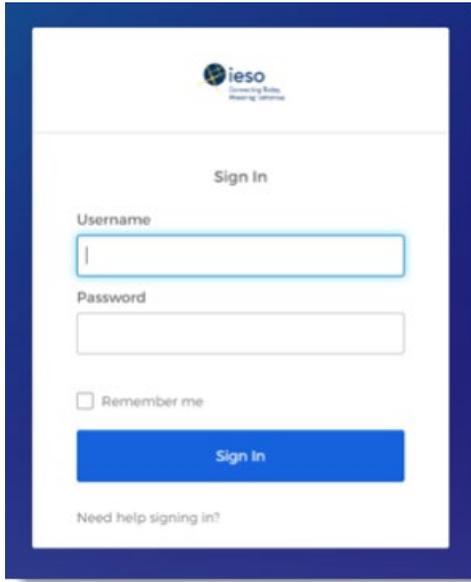
Role	Description
Supplier Agent	<p>The Supplier Agent is an optional role assigned by the Supplier Approver in relation to a microFIT Contract. When assigned to a microFIT Contract, a Supplier Agent can view the microFIT Contract and related information and prepare certain types of requests for review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

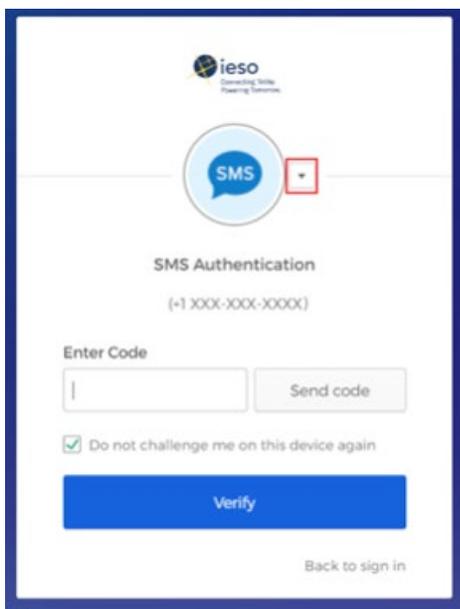
Procedure

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



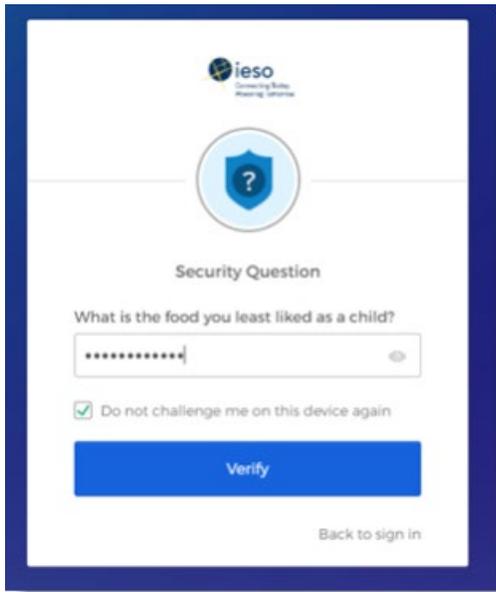
The screenshot shows the IESO Sign In page. At the top is the IESO logo with the tagline "Powering Ontario, Planning Tomorrow". Below the logo is the heading "Sign In". There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "Sign In" button is positioned below the checkbox. At the bottom left, there 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.

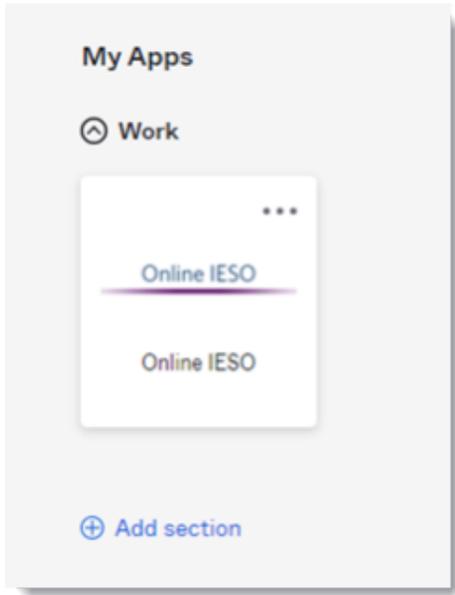


The screenshot shows the IESO SMS Authentication page. At the top is the IESO logo. Below the logo is a circular icon with "SMS" inside, next to a red square containing a white downward-pointing arrow. Below this is the heading "SMS Authentication" and a phone number placeholder "(+1 XXX-XXX-XXXX)". 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 labeled "Do not challenge me on this device again". A blue "Verify" button is at the bottom. At the bottom right, there is a link that says "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.**



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.

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



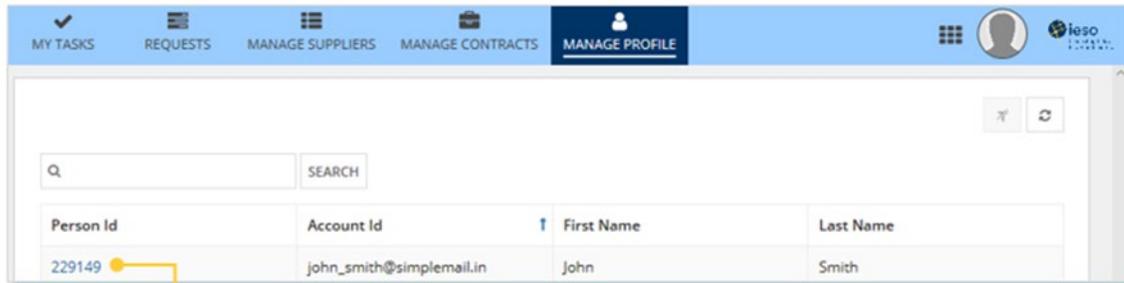
Register for Retrofit

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.

Person Overview

Manage Profile Page

On the **MANAGE PROFILE** page you'll see your basic account profile information.



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

Person Record Overview

An individual user's detailed profile information is contained on the Person Record. The Person Record is linked to an account, which the individual user can access to manage all applicable Suppliers and Contracts.

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

The screenshot shows the 'Person Record Summary' page for 'jon snow [855156]'. The page has a navigation bar with tabs: Summary, Requests, Suppliers, Contracts, LDC, Documents, and Related Actions. At the top right, there are buttons for 'CHANGE TO EMAIL ADDRESS' and 'UPDATE PROFILE'. A yellow banner at the top of the main content area says 'RECORD LOCKED'. Below this is a table with columns: Request ID, Request Type, Date Requested, and Requested By. The table contains one row with Request ID 'P4180', Request Type 'Update to Contact Information', Date Requested 'Dec 13, 2022 01:46 PM EST', and Requested By 'Jon Snow'. Below the table is a 'Contact Details' section with fields for Person ID, Account ID, Person Name, and Registration Date. At the bottom of this section is a link: 'Update Password and/or Challenge Questions'. Below that is a 'Contact Info' section with fields for Address, Main Phone, Primary Email, Alternate Email 1, and Alternate Email 2.

Callout boxes:

- Requests tab:** If there is an active Request or a draft related to a Person, the Record will be locked.
- Requests tab:** To see all the active and closed Requests that are related to the Person, select the **Requests** tab.
- Documents tab:** To view and download documents related to the Person, select the **Documents** tab.
- Related Actions tab:** To see the available actions that you can take, select the **Related Actions** tab.
- CHANGE TO EMAIL ADDRESS button:** To update your email address, select **Change To Email Address**.
- UPDATE PROFILE button:** To update your profile, select **Update Profile**.
- RECORD LOCKED banner:** The **Record Locked** table shows information about the Request that is locking the Person Record. For more details, select the **Request ID**.
- Update Password and/or Challenge Questions link:** To change your password and/or your security question(s), select **Update Password and/or Challenge Questions**.

Managing Person Requests

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) project.

The following instructions will guide you through how to Add and/or Remove Contacts from Supplier(s) or Contract(s) in Beacon.

Adding Supplier Contacts to Supplier

Procedure

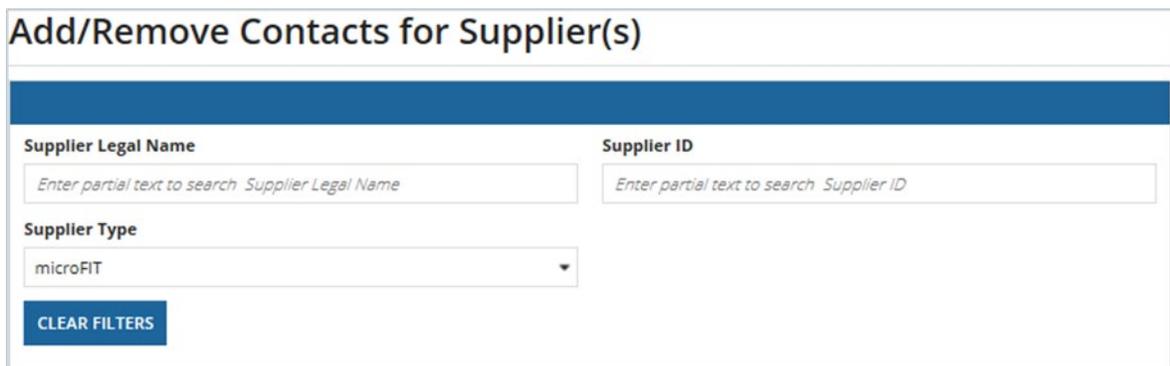
1. Select the **MANAGE SUPPLIERS** tab.



2. Select Add/Remove Contacts for Supplier(s). This brings you to the Add/Remove Contacts for Supplier(s) page.



3. **Optional:** Use the filters to search for the Supplier(s) that you want to add.

The page title is 'Add/Remove Contacts for Supplier(s)'. Below the title is a blue header bar. The main content area contains two search input fields: 'Supplier Legal Name' and 'Supplier ID', both with placeholder text 'Enter partial text to search Supplier Legal Name' and 'Enter partial text to search Supplier ID' respectively. Below these is a 'Supplier Type' dropdown menu with 'microFIT' selected. At the bottom left is a blue button labeled 'CLEAR FILTERS'.

4. Check the box(es) for the Supplier(s) that you want to add.

Note: Supplier(s) can be selected of same Supplier Type only. Locked suppliers excluded.

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

CLEAR SELECTION

Supplier(s) Selected [2]

Contact Request Type? *

Add Contacts Remove Contacts

CANCEL **NEXT >**

5. Select Add Contacts and then select **NEXT**.
6. A dialog box is opened, select **Yes**.

This will lock all suppliers selected and their contracts. Continue?

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

Submit Add Contact Person to Supplier/Contract

Add Contacts to Supplier Add to Contracts (Optional) Supporting Documents Review

Request - Add Contact Person to Supplier/Contract

Request Type: Add Contact Person to Supplier/Contract **Supplier:** Multiple Supplier(s) selected

Requested On: Jul 8, 2019 08:52 AM EST

Requested By: John Smith

Reason for Change *

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

Describe Reason for Change *

0 out of 4000 characters entered: 4000 remaining.

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

Search Contacts

Person Id

Email Address

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 style="border: 1px solid #ccc; padding: 2px;"> Select Role ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #0056b3; color: white; margin-top: 2px;"> Select Role </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> Supplier Agent </div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> Supplier Approver </div>	×

CANCEL REQUEST

NEXT >

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

12. **Optional:** On the **Add to Contracts (Optional)** page, select the Contracts related to the Supplier that you want to add the Contact(s) to.

Add Contracts to Supplier Add to Contracts (Optional) Supporting Documents Review

Find available contracts engaged with selected Supplier(s)

Available Contracts

For the selected contact(s) to be added in the contract(s), please select one or more contracts

<input type="checkbox"/>	Business Contract ID	Status	Contract Version
<input type="checkbox"/>	- 123 Joint Venture (1 Contracts)		
<input type="checkbox"/>	FIT-MAAAAAA	Executed	4.1
<input checked="" type="checkbox"/>	- ABC Farmer Entity (1 Contracts) FIT-MBBBBBB	Executed	2.0

Selected Contacts - [1]

Person Id	Person Name	Email Address	Role
229149	John Smith	john_smith@simplemail.in	Supplier Agent

CANCEL REQUEST < BACK NEXT >

13. Select **NEXT**.

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

Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD Drop file here

File size limit upto: 30 MB

Document Type *
----- Please Select -----

Description

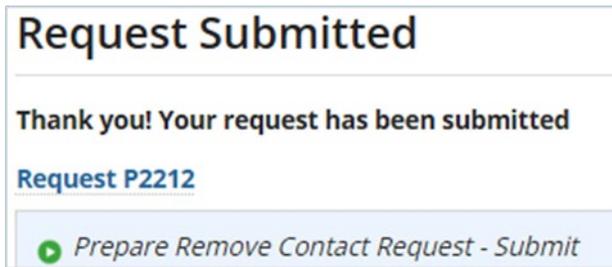
0 out of 200 characters entered: 200 remaining.

CANCEL ADD DOCUMENT

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

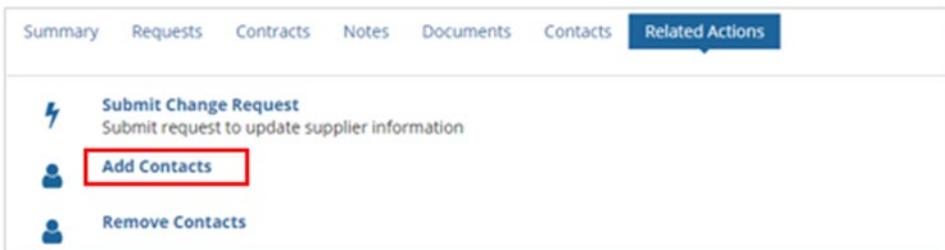
15. On the Review page, look over all your changes, and then select **SUBMIT REQUEST**.

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



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

Alternatively, you can initiate a Request to add Supplier Contacts from a Supplier by going to a Supplier Record and selecting **Related Actions** > **Add Contacts**.



Removing Supplier Contacts from Suppliers

Procedure

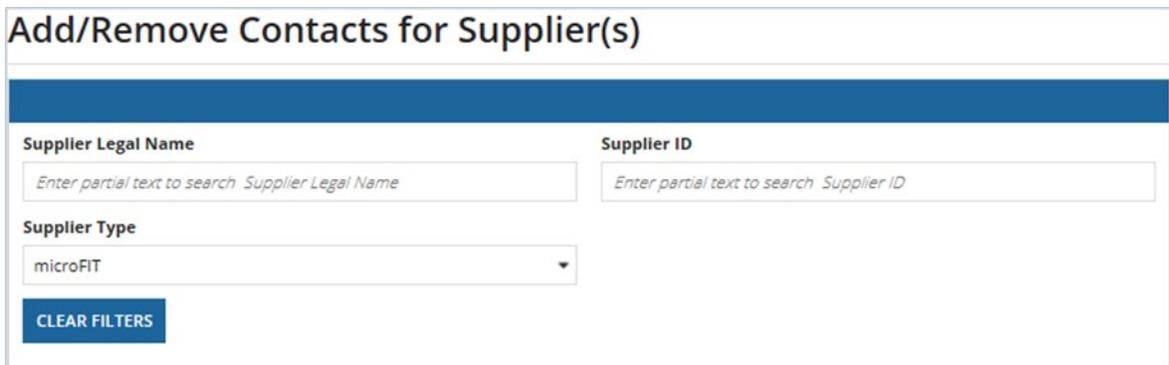
1. Select the **MANAGE SUPPLIERS** Suppliers tab.



2. Select Add/Remove Contacts for Supplier(s). This brings you to the Add/Remove Contacts for Supplier(s) page



3. **Optional:** Use the filters to search for the Supplier(s) you want to remove.

The 'Add/Remove Contacts for Supplier(s)' page features a search filter section. It includes two text input fields: 'Supplier Legal Name' with placeholder text 'Enter partial text to search Supplier Legal Name' and 'Supplier ID' with placeholder text 'Enter partial text to search Supplier ID'. Below these is a 'Supplier Type' dropdown menu currently set to 'microFIT'. A blue 'CLEAR FILTERS' button is located at the bottom left of the filter section.

4. Check the box(es) for the Supplier(s) that you want to remove.

Note: Supplier(s) can be selected of same Supplier Type only. Locked suppliers excluded.

•

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

CLEAR SELECTION

Supplier(s) Selected [2]

Contact Request Type? *

Add Contacts Remove Contacts

CANCEL **NEXT >**

5. Select Remove Contacts and then Select **NEXT**.
6. A dialog box is opened, select **Yes**.

This will lock all suppliers selected and their contracts. Continue?

7. On the **Remove Contacts to Supplier** page, choose a reason for submitting the change, and then enter a description for your Request.

Submit Remove Contact Person from Supplier/Contract

Remove Contacts from Supplier Remove from Contracts (Mandatory) Supporting Documents Review

Request - Remove Contact Person from Supplier/Contract ▼

Request Type: Remove Contact Person from Supplier/Contract **Supplier:** Multiple Supplier(s) selected

Requested On: Jul 30, 2019 10:15 AM EST

Requested By: John Smith

Reason for Change *

----- Please Select ----- ▼

Describe Reason for Change *

0 out of 4000 characters entered: 4000 remaining.

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

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

Available Contacts				
NOTE: Select at least one contact from selected supplier(s). Suppliers having one Approver cannot be selected				
<input type="checkbox"/>	Person Id	Person Name	Email Address	Role
<input type="checkbox"/>	- ABC Corporation (4 Contacts)			
<input type="checkbox"/>	• 001234	Jane Doe Supplier	email123@sharklasers.com	Supplier Approver
<input checked="" type="checkbox"/>	• 001235	John Smith	emailabc@sharklasers.com	Supplier Approver
<input checked="" type="checkbox"/>	• 001236	Paul Smith	email456@sharklasers.com	Supplier Approver

9. On the **Remove from Contracts (Mandatory)** page, review the Contracts associated with the selected Supplier(s). All the selected Contacts will be removed from these Contracts.
10. Select **NEXT**.
11. **Optional:** On the Upload Supporting Documents page, select the **+UPLOAD NEW DOCUMENT** icon. Attach a document, choose a document type, enter a description, and then select the **ADD DOCUMENT** icon.

Supporting Documents [Empty - 1 Pending]

Select Document to Upload

UPLOAD Drop file here

File size limit upto: 30 MB

Document Type *

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

Description

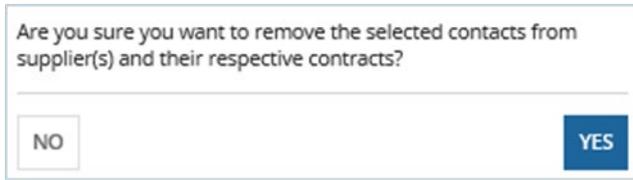
0 out of 200 characters entered: 200 remaining.

CANCEL ADD DOCUMENT

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

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

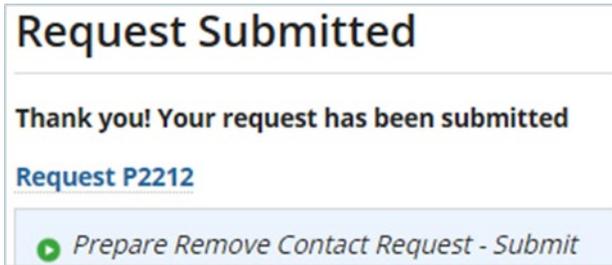
13. A dialog box is opened, select **Yes**.



Are you sure you want to remove the selected contacts from supplier(s) and their respective contracts?

NO YES

14. Once the Request is submitted, a confirmation page is displayed.



Request Submitted

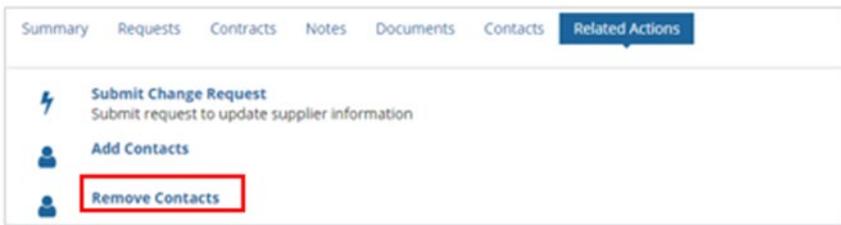
Thank you! Your request has been submitted

[Request P2212](#)

 *Prepare Remove Contact Request - Submit*

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

Alternatively, you can initiate a Request to remove Supplier Contacts from a Supplier by going to a Supplier Record and selecting **Related Actions** > **Remove Contacts**



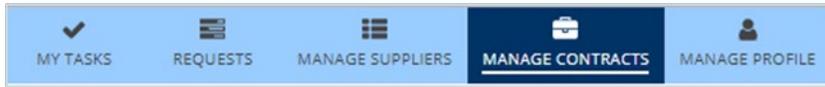
Summary Requests Contracts Notes Documents Contacts **Related Actions**

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

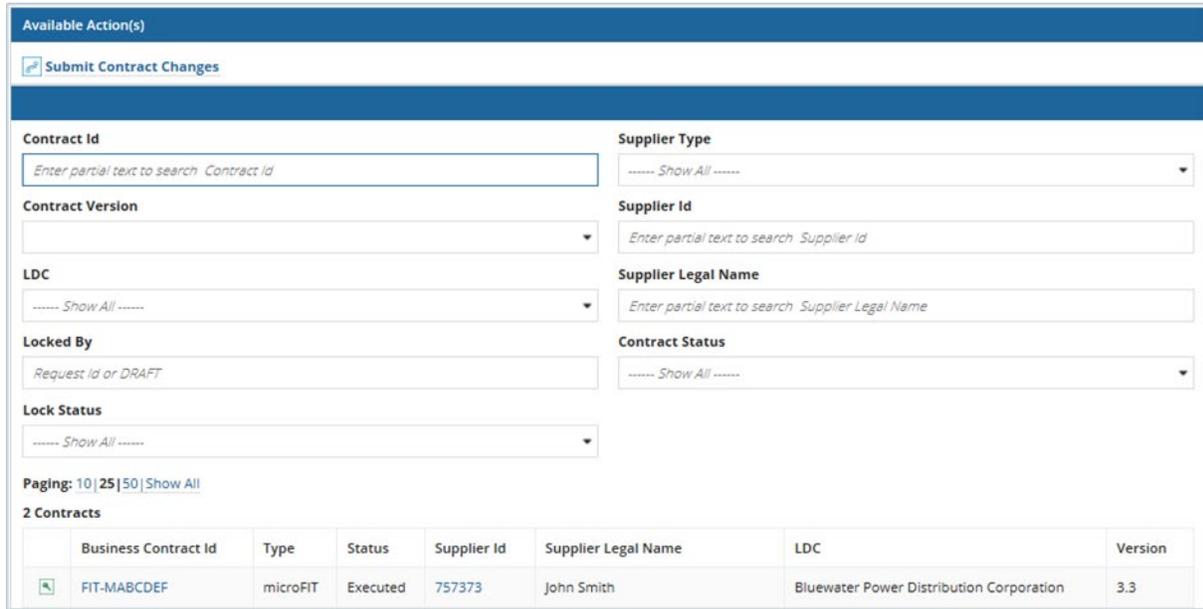
Adding Supplier Contacts to a Contract

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.



Available Action(s)

[Submit Contract Changes](#)

Contract Id

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

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

Supplier Id

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

Supplier Legal Name

Locked By

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

Lock 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	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	Select Role	X

CANCEL REQUEST

Select Role
Supplier Agent
Supplier Approver

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

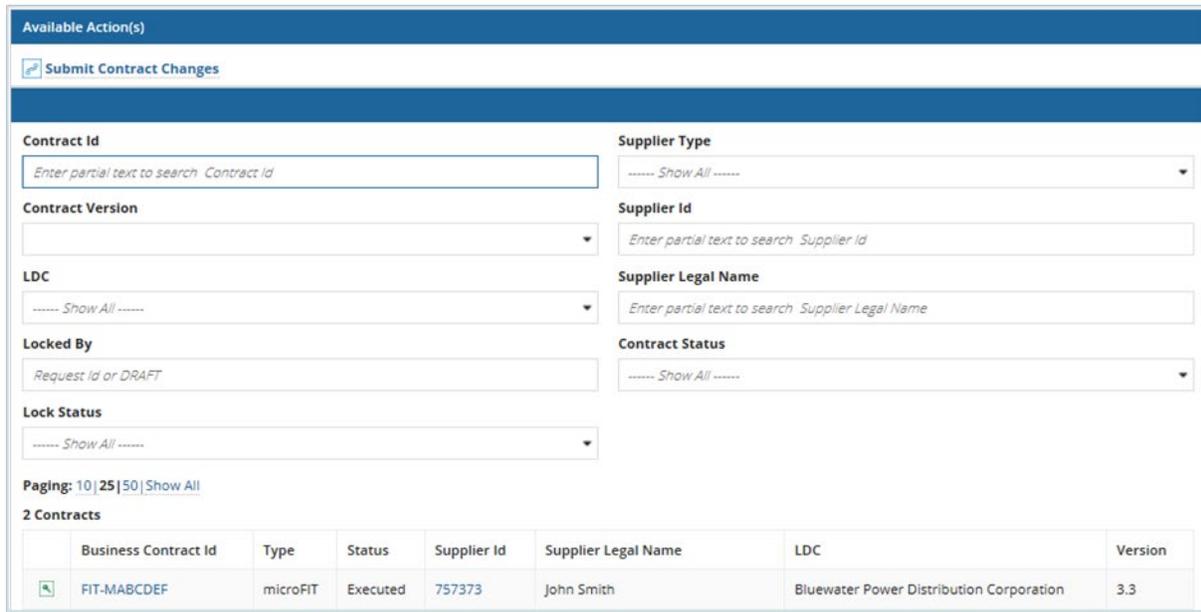
Removing Supplier Contacts from a Contract

Procedure

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

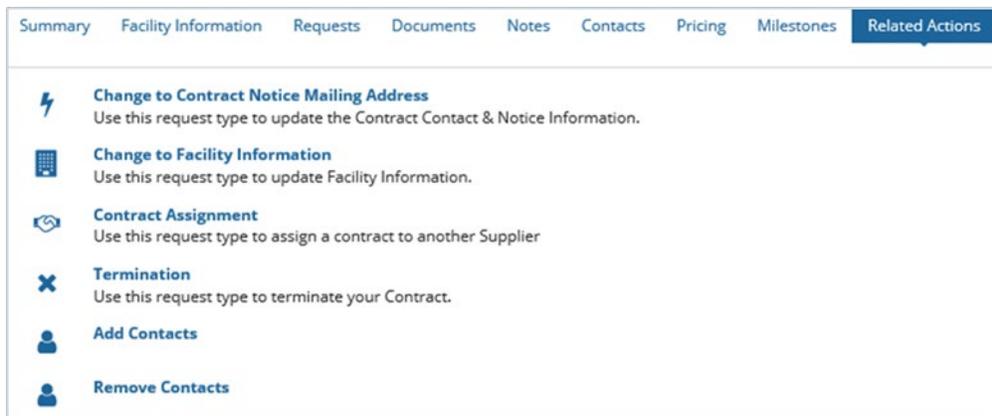


2. **Optional:** Use the filters to search for the Contract that you want to remove Contacts from.
3. Select the **Business Contract ID** to view the Contract that you want to remove Contacts from.

The image shows a web interface for managing contracts. At the top, there is a blue header with the text 'Available Action(s)' and a button labeled 'Submit Contract Changes'. Below this, there are 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 pagination control showing 'Paging: 10 | 25 | 50 | Show All' and a table with 2 contracts. The table has columns for Business Contract Id, Type, Status, Supplier Id, Supplier Legal Name, LDC, and Version.

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**.



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*

Changing Your Email Address

During the term of your microFIT Contract(s), there might be changes to the email address associated with the Person record.

The following instructions will guide you through how to change the email address associated with the Person record in Beacon.

Procedure

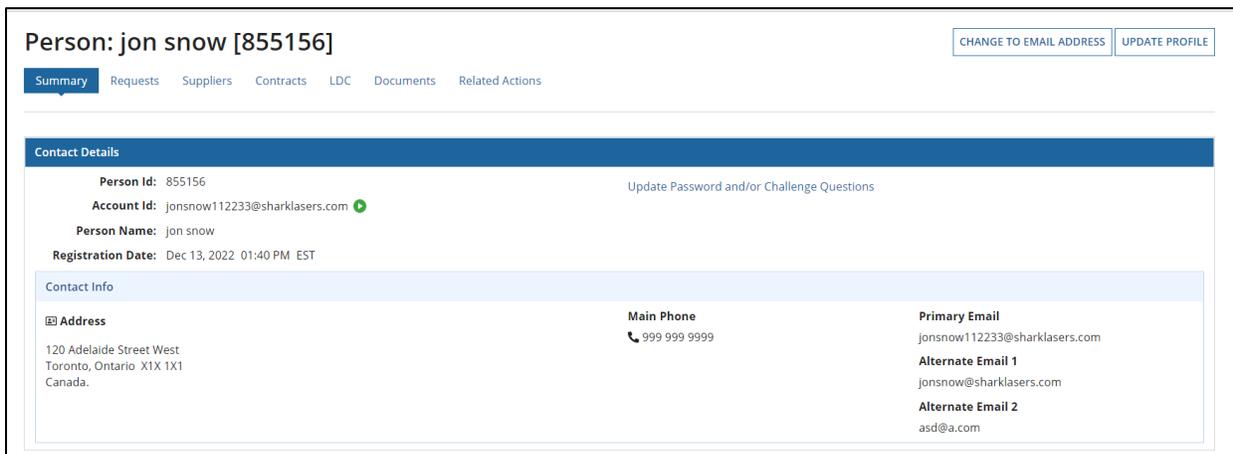
1. Select the **MANAGE PROFILE** tab.



2. Select the **Person Id.**



3. Select **CHANGE TO EMAIL ADDRESS** on the top right corner.



4. Under the Reason For Change Email To Email Address dropdown, select Email Address is outdated/inactive.
5. Enter a description in the Reason for Change to Email Address.
6. Enter the new email address in the **Email Address** field.
7. Click **SUBMIT**

Reason for Change to Email Address *
----- Please Select -----

Reason for Change to Email Address *

0 out of 4000 characters entered; 4000 remaining.

Email Address *

Previous Value:

CANCEL REQUEST **SUBMIT**

8. Once approved by the IESO, an email will be sent to the email address with instructions on how to log on using the new email address.

Person Request Tasks

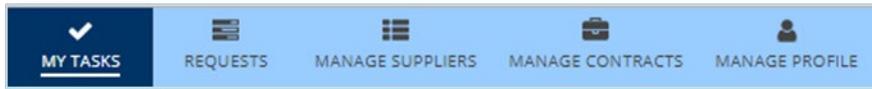
Reviewing Requests Submitted by a Supplier Approver

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.

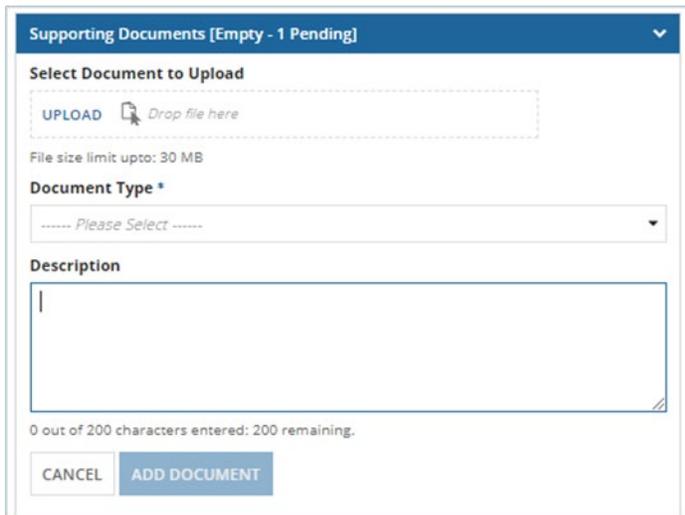
Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3174	Change to Supplier Resident Status	[DRAFT]	Supplier	Supplier Approver Review Request	<input checked="" type="checkbox"/>

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



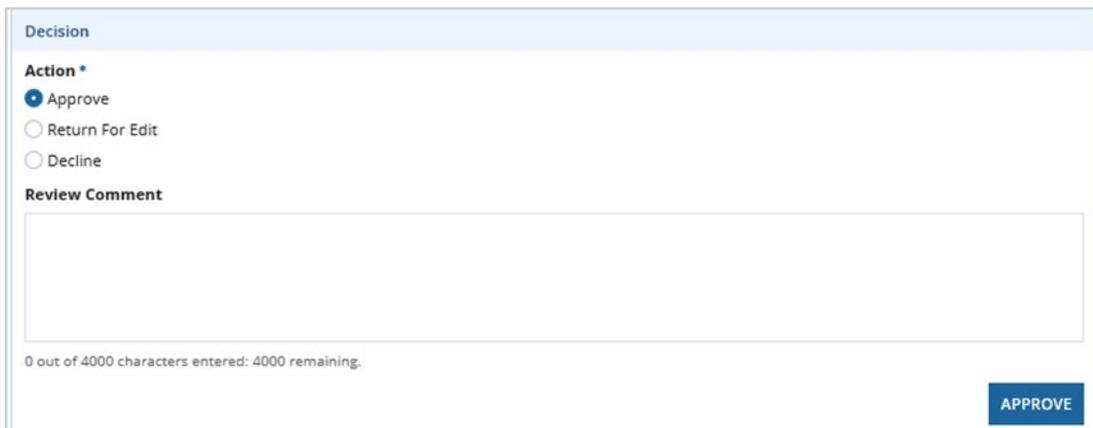
4. Review the values entered and the documents in the Request.

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" 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.

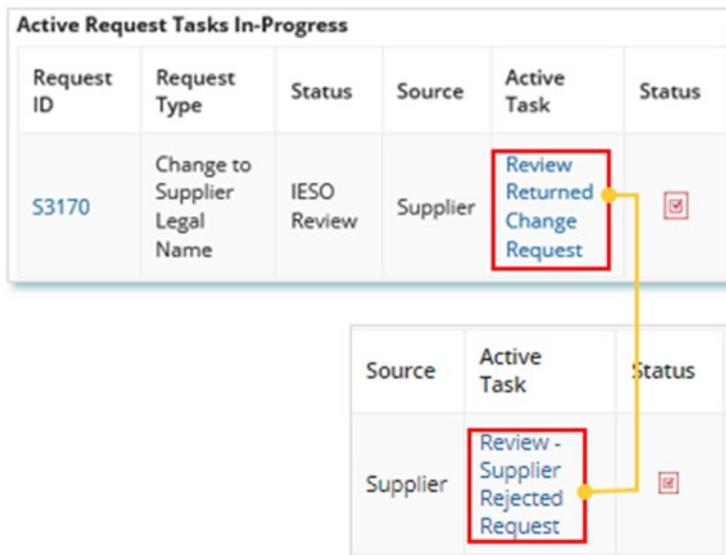
If you are assigned a task, you will receive an email notification. You can view active tasks assigned to you on the **MY TASKS** tab.

Procedure

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



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



The image shows two screenshots of a table titled 'Active Request Tasks In-Progress'. The top screenshot shows a table with 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 box to a second screenshot below. The second screenshot shows a zoomed-in view of the 'Active Task' column for the same row, with a red box around the text 'Review - Supplier Rejected Request'.

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 "Decision *" section with two radio buttons: "Request Updated" (which is selected) and "Cancel". Below this is a "Request Updated Comment" section with a large text input area. 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".

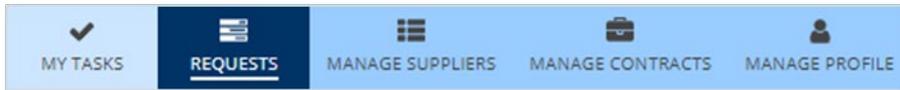
Cancelling a Submitted Request

You can cancel a Request that you submitted.

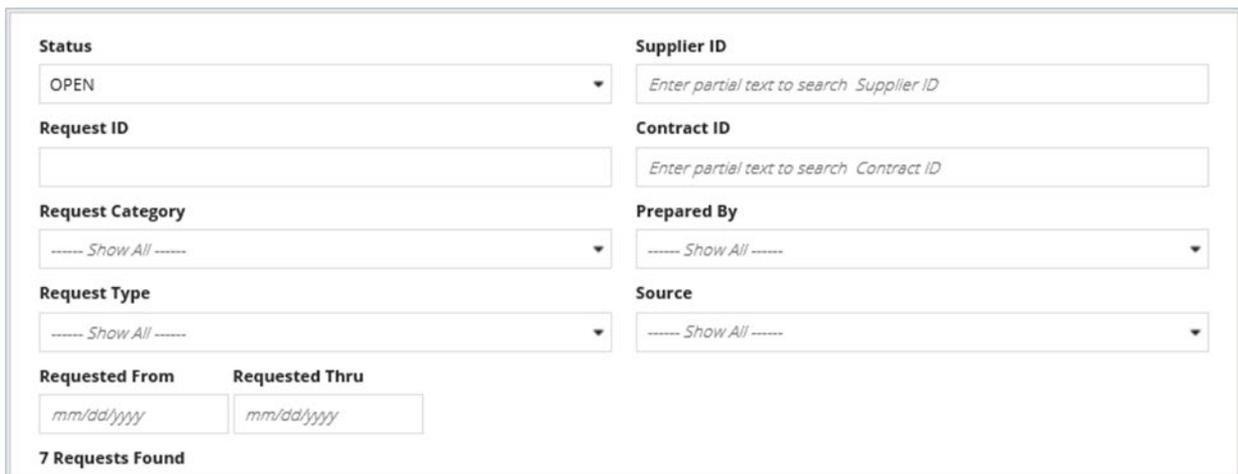
Note: You can cancel a Request only if you initiated the Request and before the IESO has accepted the Request for review.

Procedure

1. Select the **Requests** tab.



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

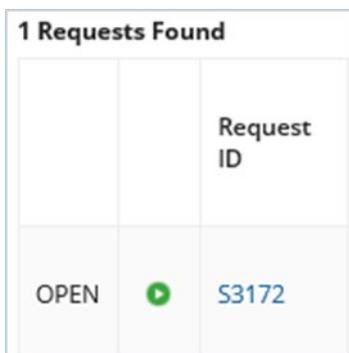


A filter panel with the following fields:

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

7 Requests Found

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



1 Requests Found		
		Request ID
OPEN		S3172

4. Select CANCEL REQUEST.

Supplier Request [S3172] CANCEL REQUEST

Summary Attachments Related Actions

Submitted IESO Review Closed

OPEN

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

Confirm Cancellation of Request S3172

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

+ Prepare Change Request - Submit

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

Comment
Updating legal name

Request - Change to Supplier Legal Name >

Describe Reason for Cancelling Request *

0 out of 4000 characters entered: 4000 remaining.

BACK CANCEL REQUEST

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

Are you sure?

NO YES

8. Refresh your page.

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

Submitted IESO Review Closed

CLOSED

Close Request - Closed

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

Comment
< No Comment >

Request - Change to Supplier Legal Name

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

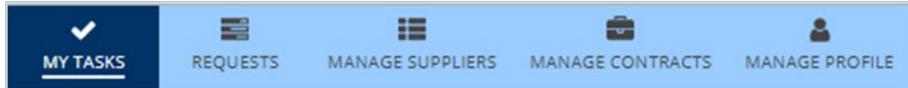
Providing Acknowledgement of a Request Outcome

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

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

Procedure

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

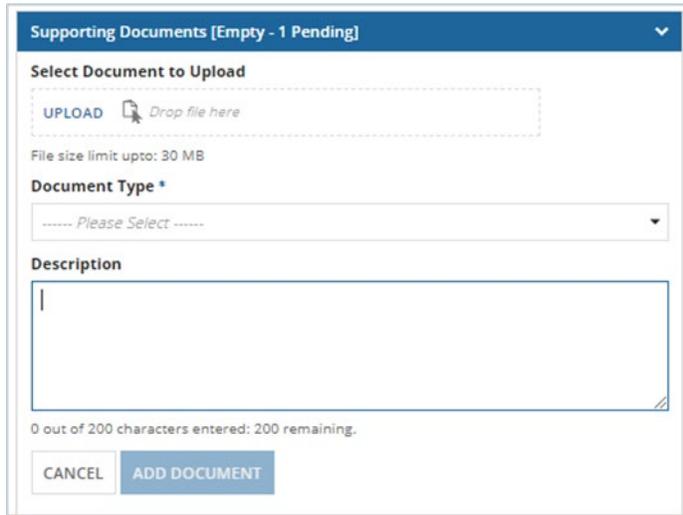


2. Select the Provide Acknowledgement task. This brings you to the **Pending Acknowledgement** page.

Active Request Tasks In-Progress					
Request ID	Request Type	Status	Source	Active Task	Status
S3370	Change to Supplier HST-GST Status/Number	Pending Acknowledgement	Supplier	Provide Acknowledgement	<input checked="" type="checkbox"/>

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.



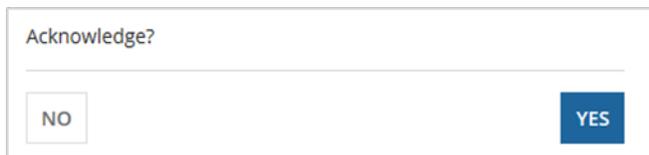
The screenshot shows a dialog box titled "Supporting Documents [Empty - 1 Pending]". It contains a "Select Document to Upload" section with an "UPLOAD" button and a "Drop file here" instruction. Below this, it states "File size limit upto: 30 MB". There is a "Document Type" dropdown menu with "Please Select" as the current selection. A "Description" text area is present, with a character count below it: "0 out of 200 characters entered: 200 remaining." At the bottom, there 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 text area for providing feedback or comments. The text above the field reads: "Provide feedback or comments below as necessary (If issues, please document below and submit a separate request):". Below the text area, it says "0 out of 4000 characters entered: 4000 remaining." A blue "ACKNOWLEDGED" button is located at the bottom right of the field.

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



The screenshot shows a dialog box titled "Acknowledge?". It has a horizontal line for a response 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.

Status CLOSED	Supplier ID Enter partial text to search Supplier ID	Final Outcome --- Show All ---
Request ID S3251	Contract ID Enter partial text to search Contract ID	Final Outcome Decision Date From mm/dd/yyyy
Request Category --- Show All ---	Prepared By --- Show All ---	Final Outcome Decision Date Thru mm/dd/yyyy
Request Type --- Show All ---	Source --- Show All ---	
Requested From mm/dd/yyyy	Requested Thru mm/dd/yyyy	

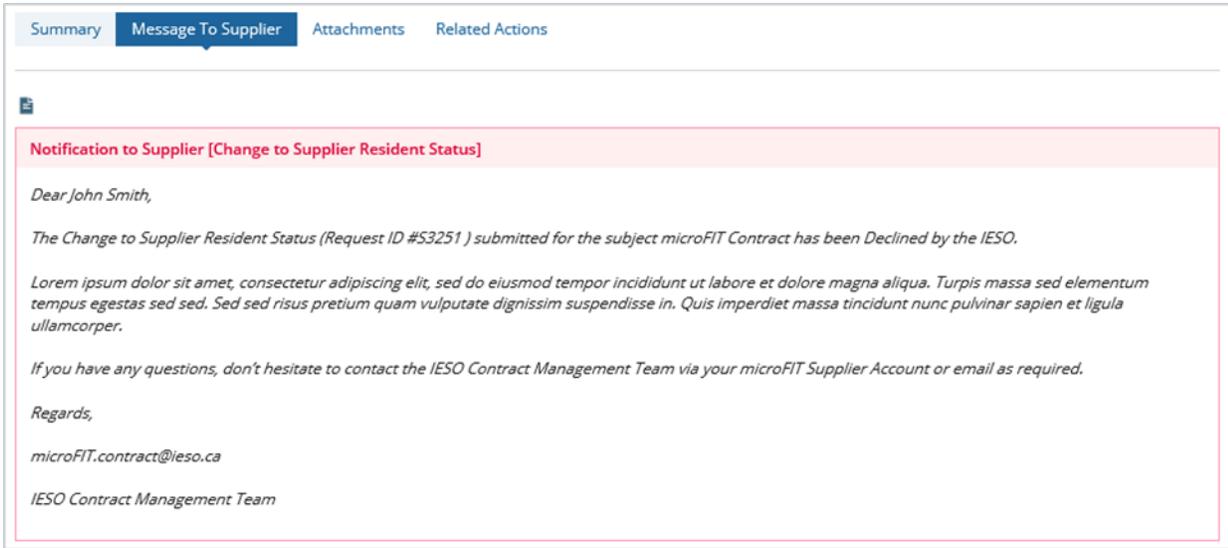
1 Requests Found

		Request ID	Request Type	Requested	Requested By	Prepared By	Supplier ID	Final Outcome Decision Date	Final Outcome Decision By
CLOSED	×	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST	John Smith	John Smith	221524	Jul 25, 2019 10:35 AM EST	IESO

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

1 Requests Found				
		Request ID	Request Type	Requested
CLOSED	×	S3251	Change to Supplier Resident Status	Jul 25, 2019 10:33 AM EST

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



The screenshot shows a web interface with four tabs: 'Summary', 'Message To Supplier', 'Attachments', and 'Related Actions'. The 'Message To Supplier' tab is active. Below the tabs, there is a notification header: '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.

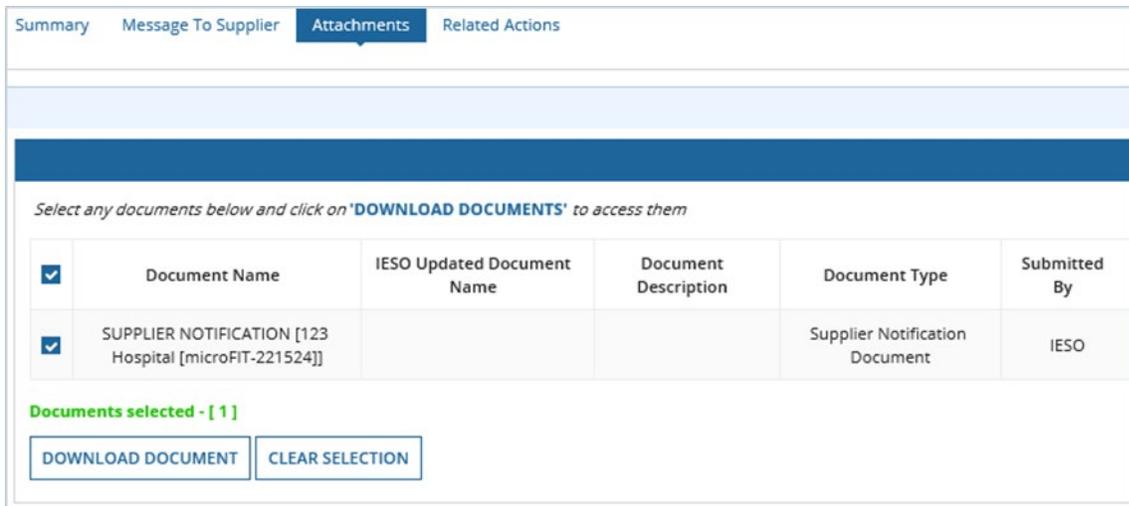
If you have any questions, don't hesitate to contact the IESO Contract Management Team via your microFIT Supplier Account or email as required.

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. Below the tabs, there is a blue bar with the text: 'Select any documents below and click on **DOWNLOAD DOCUMENTS** to access them'. Below this is a table with the following columns: 'Document Name', 'IESO Updated Document Name', 'Document Description', 'Document Type', and 'Submitted By'. There are two rows in the table, both with a checked checkbox in the first column.

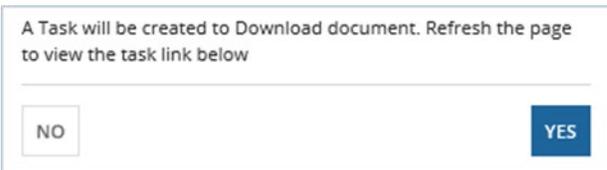
<input checked="" type="checkbox"/>	Document Name	IESO Updated Document Name	Document Description	Document Type	Submitted By
<input checked="" type="checkbox"/>	SUPPLIER NOTIFICATION [123 Hospital [microFIT-221524]]			Supplier Notification Document	IESO

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 text: 'A Task will be created to Download document. Refresh the page to view the task link below'. Below the text are two buttons: 'NO' and '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?

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?

Additional Resources

Additional resources can be found at the following links:

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

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System Operator**

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