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#### User Access

#### Obtaining a User Name

To access the NYISO Member Community, each customer may request a username from their Member Community Administrator. This is an assigned contact from within your organization. Once approved, this will prompt an email to your inbox welcoming you to the NYISO Member Community with a link to activate your account and set up your password. You will then be prompted to login <a href="https://nyiso.force.com/MemberCommunity/s/login/">https://nyiso.force.com/MemberCommunity/s/login/</a>









## **Edit Personal Profile**

Keeping your contact information accurate and current ensures that you are able to receive important updates from the NYISO.

- 1. Select "Edit Your Profile" from the home page. (Figure 2)
- 2. Make any updates or changes and subscribe to optional email lists. (Figure 3)

	Edit Profile				
	г Name ————				
	Title	Salutation Mr.			
	First Name Steven	Middle Name	Last Name *		
	Contact Information —				
	Email Address ssmithnyepi@gmail.com	Primary Phone 555-518-5555	Primary Extn		
	Fax	Secondary Phone	Secondary Extn		
	Mobile (596-555-1245	24/7 Phone	24/7 Extn		
	Address				
	627 Main Street	State	Country		
	Rochester	New York	United States		
	2ip Code (14690				
	Optional Email List	otification			
and the second	Contrast of the second se	no (RIO) Tt Notifice Ion	an we what and g	m. John marker of	



3. Select "Save" at the bottom. (Figure 4)



## Submit a New General Inquiry

To submit a General Inquiry, select "New inquiry" from the home page. Enter the Subject and Description and click the Save button. You can also attach any files that you would like to provide by clicking on the Browse button to add your attachment.

Inquiry Details	Insular Catagory	
	General	
Description		
	^	
	~	
File Upload		
Attachment Browse		
Cancel Save		
Need Societance with this form?		

- 1. Select "New Inquiry" from the home page. (Figure 2)
- 2. Select "General Inquiry" from the drop down.
- 3. Enter subject and description of inquiry. (Figure 5)
- 4. Upload any images or files that relate to the inquiry.
- 5. Select "Save".



# Submit Affiliate Data as an Inquiry

For those of you that submit the Annual Affiliate Update you can now do so through the NYISO Member Community. Just open a new inquiry, and change the Inquiry Category from General to Corporate Affiliates. Changing the Inquiry Category will automatically populate with the affiliate instructions and the downloadable affiliate form to complete and attach to the inquiry. Please download and complete the form per the instructions before submitting to the NYISO.

Subject	Inquiry Category
C	Corporate Affiliates
Description	
	~
	$\sim$
- Instructions	
Each Applicant must provide the NYISO with a list Customer or Limited Customer. Existing Custome an annual basis, as well as update the NYISO with	t of its Affiliates along with its Application to become a ers are required to provide an updated list of their Affiliates on hin 30 days of any changes to its Affiliates.
The Applicant/Customer must provide:	an see on a latter a second a set of a second second
<ul> <li>(i) The Applicant/Customer name;</li> <li>(ii) Indicate whether the Applicant/Customer is put</li> </ul>	blicly traded and provide its trading symbol, if applicable;
<ul> <li>(iii) Indicate whether the Applicant/Customer has in (iv) List all Applicant/Customer's Affiliates;</li> </ul>	unsecured credit,
<ul> <li>(v) Indicate whether each Amilate is publicly trade</li> <li>(vi) Indicate the type of Affiliate, choosing from: UI</li> <li>(vii) Indicate whether the Affiliate is also a NYSO</li> </ul>	timate Parent; Intermediate Parent; Other Affiliate;
(vii) indicate whether the Anniale is also a W150	Customer.
File Download	
Download the Corporate Affiliate/Parent Information	on Form
- File Upload	
Attachment	
Browse	

- 1. Select "New Inquiry" from the home page. (Figure 2)
- 2. Select "Corporate Affiliates" from the drop down. (Figure 6)
- 3. Enter subject and description of inquiry.
- 4. Upload the completed Corporate Affiliate/Parent Information Form.
- 5. Select "Save".



## Review Status of Inquiry

All inquiries to the NYISO whether by phone, email or through the NYISO Member Community will be available for reference under the "Inquiries" tab. Any contact who is given permission to have access to the NYISO Member Community will be able to view all historical cases for your organization for each contact.

CONTACTS IN	QUIRIES LOCOUT		
		New Inquiry	
NQUIRIES			
ASE NUMBER	CONTACT NAME	SUBJECT	STATUS
0002105	Steven Smith	Affiliates for 2018	Pending Customer
0002135	Sara Evans	Consolidated invoice mapping to DSS?	In Progress
0002136	Sara Evans	Where can I find the Market Participants User's G	Closed
0002185	Steven Smith	Inquiry upload attachment	In Progress
0002186	Sara Evans	How do I obtain a MyNYISO.com account?	Closed

Figure 7

To check the status of a newly created inquiry please follow the steps below. *Please note that your new inquiry will not appear in your list until NYISO has assigned a case number to your inquiry.* 

- 1. Select "Inquiries" from the home page. (Figure 2)
- 2. Select the case number you wish to review *details* of. (Figure 8)
- 3. Note the Status field. Options are;

In-Progress – NYISO Stakeholder Services is reviewing your inquiry for an answer Assigned to SME - NYISO Stakeholder Services has requested the advice of a subject matter expert to answer your inquiry

*SME Responded* – The subject matter expert has provided advice to NYISO Stakeholder Services for an answer

*Pending Customer* – The NYISO has requested further details from the customer and we are awaiting a response

*Closed* – NYISO Stakeholder Services has provide an answer in the disposition field and has closed the inquiry.



	View and Add Comments
DETAILS	
Case Number	Stakeholder Services Owner
00002186	Kasia Shunk
Subject	Status
How do I obtain a MyNYISO.com account?	Closed
Description	Category
I would like to access locked committee files and I am told I need a MyNYISO.com account. Can you please tell me how I can obtain one?	General
Comments for Customer	Disposition 0
	Please complete the CEII/NDA request form found at http://www.nyiso.com/public/webdocs/markets_ope rations/services/customer_relations/CEII_Request _Form/CEII_Request_Form_and_NDA_complete.p df

- Figure 8
- 4. The final Disposition (answer) will be viewed here. (Figure 8) OR
- 5. Select View and Add Comments for previous comments made and to add any additional comments to be viewed by NYISO Stakeholder Services. (Figure 8)



#### View and Add Comments

This is where you are able to correspond with Stakeholder Services regarding your inquiry. You can see existing comments from NYISO Stakeholder Services, can add your own comments and also upload any supporting pictures or files as attachments. Click "save" and the new comment is automatically sent to Stakeholder Services.

- New Comments	ere:
Comments	
Comments	
- Previous Commente	
( Trevious comments	
Date/Time Comment	
10/05/2017 15:4( Sara Evans	a - Thank you. Attached is my completed CEII/NDA request form.
10/05/2017 15:3: Please con	plete the CEII/NDA request form found at
http://www. Ell_Reques	nyiso.com/public/webdocs/markets_operations/services/customer_relations/C st_Form/CEII_Request_Form_and_NDA_complete.pdf and add as an
	)
- Attachment	
File Upload	
Brows	e

- 1. Select "View and Add Comments" from the inquiry page. (Figure 8)
- 2. View any comments made by NYISO Stakeholder Services.
- 3. Add a new comment or attachment.
- 4. Select "Save".



## Final Disposition of Case

Once your inquiry has been closed by NYISO Stakeholder Services, you will receive an email notification with a link to the inquiry in the NYISO Member Community. You can also access the closed inquiry in the community by going to the Inquiries tab on the menu toolbar and clicking on your case number.

In the Details section of the inquiry, you will be able to view the final comments, the final disposition and the closed case status. (Figure 8)

## Administrator Access

## Obtaining a User Name

All NYISO Member Community Accounts are required to have at least one Community Administrator. A main contact from your organization must complete and submit to NYISO Stakeholder Services the <u>Member Community Usage Agreement and Administrator Designation</u> form to designate the NYISO Member Community Administrator.

**Please note;** this is an important role as the NYISO Member Community Administrator will be responsible for administering access to the Community for additional people within your organization as well as assigning any roles (including main and credit contacts).

The NYISO Member Community Administrator role is the only user from your organization that can update the organization's account information, add and manage active and inactive contacts, assign NYISO contact roles and give additional users in your organization access to the NYISO Member Community.

As the assigned Community Administrator, you have the option to assign this role to other users in your Organization. The Community Administrator role can be transferred or assigned to multiple users in your Organization.

Once your form is received and approved, this will prompt an email to your inbox welcoming you to the NYISO Member Community with a link to activate your account and set up your password. You will then be prompted to login <a href="https://nyiso.force.com/MemberCommunity/s/login/">https://nyiso.force.com/MemberCommunity/s/login/</a>







NYISO Member Community Administrators will have the same benefits of Community Users such as Edit Your Profile and submit New Inquiry. However, there are additional account management options of View Account and New Contact. The Registration and Application features will be covered in the separate Registration Member Community Reference Guide.







Phone 518-555-3333	Website
	Fax
Shared Governance	
Shared Governance	Member Relations Liaison
Yes	
Voting Status	Sector
Voting	Generation Owner
	Sub Sector
Additional Account Informa	tion
	Fedex Address
Mailing Address	
Mailing Address 627 Main Street, Rochester, New York 14690 United States	United States
Mailing Address 627 Main Street, Rochester, New York 14690 United States Associated EIR Organization Name	United States
Mailing Address 627 Main Street, Rochester, New York 14690 United States Associated EIR Organization Name NY Energy Partners Inc	United States
Mailing Address 627 Main Street, Rochester, New York 14690 United States Associated EIR Organization Name NY Energy Partners Inc EIR Record ID	United States

# Account Management

By selecting the "View Account" button (Figure 11) you will see the current details that the NYISO has on record for your Organization. Data related to your Account Type and Category, Market Role, Shared Governance Status and additional information can be found on this details page. (Figure 12)



rganization Name		Organization Phone	
rganization name is not editable.		010 333 3333	
Billing Address			
Street Address t			
627 Main Street			
••			
City *	Country *	State *	
Rochester	United States		
Zip Code *			
14690			
Fedex Address			
Street Address			
Sileer Address			
City	Country	State	
	United States	Please select	
Zip Code			

Figure 13

To make updates to the account phone or address please click "Update Account" (Figure 12) and make any changes. Please be sure to click "Save" at the bottom to implement the updates made. Changes to your organization's Category or Market Role must go through the Registration Amendment process. Please see the separate Registration Member Community Reference Guide to make any registration updates through the NYISO Member Community.

#### Update Account

- 1. Select "View Account" from the home page. (Figure 11)
- 2. Select "Update Account". (Figure 12)
- 3. Make any changes. (Figure 13)
- 4. Select "Save". (Figure 13)



New Contact		
NITY		
EMAIL	STATUS	ALL ROLES
bwilliamsnyepi@gmail.com	Active	1
dmartinnyepi1@gmail.com	Active	4
sallynyepi@gmail.com	Active	2
smithnyepi@gmail.com	Active	0
ssmithnyepi@gmail.com	Active	6
	NITY       EMAIL         bwilliamsnyepi@gmail.com       dmartinnyepi1@gmail.com         sallynyepi@gmail.com       smithnyepi@gmail.com         smithnyepi@gmail.com       smithnyepi@gmail.com	NITY         EMAIL       STATUS         bwilliamsnyepi@gmail.com       Active         dmartinnyepi1@gmail.com       Active         sallynyepi@gmail.com       Active         smithnyepi@gmail.com       Active         smithnyepi@gmail.com       Active

#### Contact Management

By selecting the "Contacts" tab from the home page (Figure 11) you will see all of the current active contacts that the NYISO has on record for your organization. (Figure 14) You will also see if they have any assigned roles. To view the NYISO Member Community access status or assigned contact roles, select a name.

Within this contact information screen, you can see all existing contact information for that contact. (Figure 15) As an administrator you can update anyone's information by selecting "Edit Contact" (Figure 14) and following the steps from Edit Personal Profile.

You can also view any previous or existing assigned contact roles by selecting "Contact Roles". (Figure 16) Current assigned roles will have a checkmark in the box for active. Previously assigned roles will be shown in the list, but the box for active will be blank.



Steven Smith	
Edit Contact	
Edit Contact Roles	
CONTACT INFO CON	TACT ROLES
Title	Primary Phone
	555-516-5555
Name	Primary Phone Extn 0
Steven Smith	
Account Name	Secondary Phone
New York Energy Partners Incorporated	
Email	Other Phone Extn 0
ssmithnyepi@gmail.com	
Fax Number	24x7 Contact Phone
Last Portal Update By	x24x7 Phone Extn
Last Portal Update By 0 Mailing Address	x24x7 Phone Extn  Mobile Phone
Last Portal Update By  Mailing Address 627 Main Street, Rochester, New York 14690 United States	x24x7 Phone Extn Mobile Phone 596-555-1245
Last Portal Update By  Mailing Address 627 Main Street, Rochester, New York 14690 United States Community User	x24x7 Phone Extn Mobile Phone 596-555-1245
Last Portal Update By  Mailing Address 627 Main Street, Rochester, New York 14690 United States Community Username Community Username	x24x7 Phone Extn  Mobile Phone 596-555-1245 Community Profile



Steven Smith		
dit Contact		
dit Contact Roles		
ONTACT INFO	CONTACT ROLES	
	CONTACT ROLES	
Account Contac	contact roles	
CONTACT INFO CONTACT C	CONTACT ROLES	
CONTACT INFO CONTACT CONTAC	CONTACT ROLES	
CONTACT INFO	CONTACT ROLES	
CONTACT INFO CONTACT CO	CONTACT ROLES	
CONTACT INFO Account Contact NYISO ROLE BIC Primary BIC Primary Billing - Primary Credit - Primary Main - Alternate	CONTACT ROLES	
CONTACT INFO	CONTACT ROLES	

Figure 16



## Updating Account Roles

To assign or remove a role please select "Edit Contact Roles". (Figure 15)

Contact Roles New	
<ul> <li>To assign the a new contact role for the Contact select the 'Add New' value next to the contact role you would like to assign.</li> <li>Existing roles will have a value of 'Assigned'.</li> <li>To remove a role enter an 'End Date' for the role. Currently only the current date is available.</li> <li>Some roles require at least 1 contact per Account, if the 'End Date' field is not available, another contact must be assigned the role before this contact can be 'End Dated'.</li> <li>The number of Contacts assigned to each role will be listed below the role name.</li> </ul>	
Contact Name Steven Current Active Contact Roles: 6	
Main Contact Role Main Primary Contact(s) for the Account: 2	
Main Primary Role Assigned C End Date mm/dd/yyyy	
Main Alternate Contact(s) for the Account: 0	
Main Alternate Please select 🗹	
BIC Contact Role	
BIC Primary Contact(s) for the Account: 2	
BIC Primary Add New	
BIC Alternate Contact(s) for the Account: 0	
BIC Alternate Please select	
Billing Contact Role	



The name of the contact and the current number of roles assigned to the contact are listed at the top. (Figure 17) In this example Steven has 6 roles assigned to him. Any role title which has "Role Assigned" listed means that the role is currently assigned to the contact you are viewing. The number listed next to the title of the role type is how many in the organization overall are assigned to that role. In the example above, there are 2 Main Primary contacts for the account, and one is Steven as noted by the "Role Assigned".

There are three options in the drop down;

- 1. Please Select this notes that the role is not currently assigned but is an option.
- 2. Add New this is selected when you are first assigning the role to the contact.
- 3. Role Assigned this is listed to show that the role is currently assigned to the contact.



#### Adding a Role to a Contact

- 1. Select "Edit Contact Roles" from within the contact. (Figure 15)
- 2. Scroll to find the title of the role you want to assign. (Figure 17)
- 3. Select "Add New".
- 4. Select "Save".

#### Removing a Role from a Contact

- 1. Select "Edit Contact Roles" from within the contact. (Figure 15)
- 2. Scroll to find the title of the role you want to remove. (Figure 17)
- 3. Next to "Role Assigned", there is an end date option.\*
- 4. Choose todays date.
- 5. Select "Save".

\*Please note: Different customer types will have different requirements for removing roles from contacts. For instance, if you are a Market Participant, it is mandatory to have at least one contact assigned to the Main, MIS Administrator, Credit and Billing Roles. Therefore, on any role where there is a minimum of one required per your organizations registration type, *the end date option will not appear until at least 1 additional contact has been assigned that role*. Once the new contact has been assigned to that role, you can then return to the original and provide the end-date. (Figure 17)

<b>A</b>	CONTACTS	INQUIRIES LOGOUT	
		Update Contact	
		All Contact Roles must be inactive for this contact before the contact can inactivated. Please select Active Contact Roles: 0 Contact Status Contact Status Contact Status	
		Name       Title     Salutation       Image: Constraint of the select	
		First Name *     Middle Name     Last Name *       (Sam     (Smith)	
		Contact Information —	
		Email Address * Primary Phone * Primary Extn (smithnyepi@gmail.com 655-518-5555	
		Mobile Secondary Phone Secondary Extn	



## Inactivating a Contact with NYISO

- 1. Select "Edit Contact" from within the contact. (Figure 15)
- Next to "Contact Status", there is an "inactive" option. (Figure 18) (If there is not an end date option, please review note <u>here</u>. Contacts cannot be made inactive if there are existing active contact roles still assigned.)
- 3. Select "Save".

## Authorizing NYISO Member Community Users

A key feature of the NYISO Member Community for the Administrator is the ability to grant Community access to contacts within their Organization. The Community Administrator creates the user name, which is required to be in email format, sets the user profile access type and activates or inactivates each user.

CONTACTS IN	QUIRIES LOGOUT	
	Update Contact Contact Status All Contact Roles must be Active Contact Roles: Name	e inactive for this contact before the contact can inactivated. 1
	Address Mailing Street City Zip Code	State Country Please select V Please select V
	Community User — User Name (brenda.williams@nyepi.com For customers that are as Usernames must be in e Profile (Portal User	sociated with multiple accounts a unique username is required for each account. mail format but are not required to be valid i.e. yournameACME@company.com. User Status
	Optional Email List	



- 1. Select "Edit Contact" from within the contact. (Figure 15)
- 2. Scroll to find "Community User". (Figure 19)
- 3. Under "Community User", create the User Name which must be in email format.
- 4. Select Profile type. There are three options in the drop down menu;
  - a. Portal Administrator This is selected when you want to give another user the administrator powers granted to you as an administrator.
  - b. Application Editor This is selected when you will have a user completing forms from within the Registration or Applications sections.
  - c. Portal User This is selected when giving privileges for a user to update their contact information and create inquiry tickets directly with the NYISO.
- 5. Select "Active" under the User Status.
- 6. Select "Save". The contact will then receive their welcome email from the NYISO Member Community.

## Inactivating NYISO Member Community Users

When an authorized NYISO Member Community user leaves your organization, it is very important that the Community Administrator inactivate that Community User. If the user is not inactivated, they will continue to have access to your NYISO Member Community. You will also want to inactivate them from your contacts list.

You must first inactivate the community user status.

- 1. Select "Edit Contact" from within the contact. (Figure 15)
- 2. Scroll to find "Community User". (Figure 19)
- 3. Select "Inactive" under the User Status.
- 4. Select "Save".

Next, remove any existing contact roles by following steps at <u>Removing a Role from a Contact</u>.

Lastly, inactivate the contact from your NYISO Contact list.

- 1. Select "Edit Contact" from within the contact. (Figure 15)
- 2. "Contact Status" will be at the top. (Figure 18)
- 3. Select "Inactive".
- 4. Select "Save".

Once you inactivate the contact, that contact will no longer be visible within your contacts screen.

Please contact the NYISO Stakeholder Services team at 518-356-6060 or <u>stakeholder\_services@nyiso.com</u> with any questions.