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 https://nyiso.force.com/MemberCommunity/s/login/

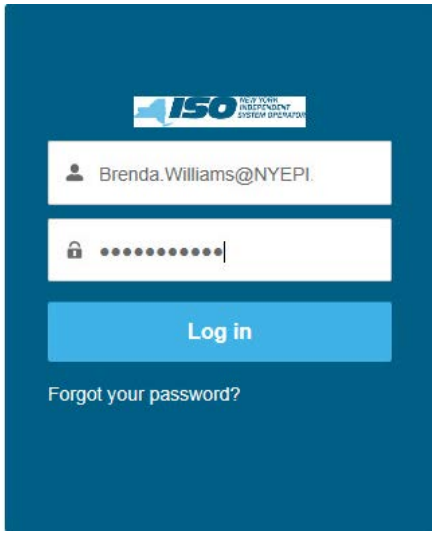


Figure 1

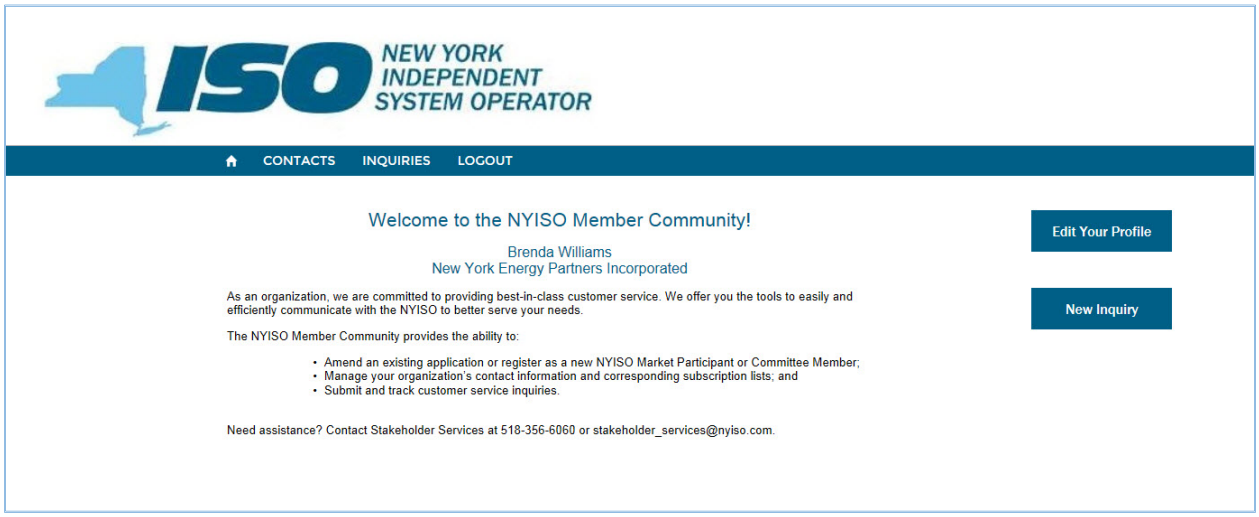


Figure 2

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)

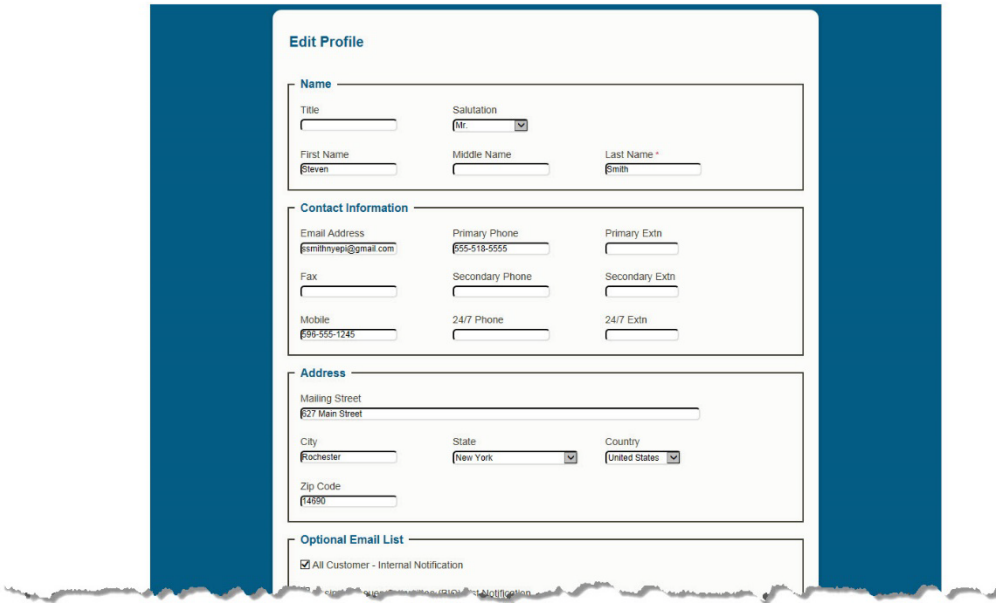


Figure 3

3. Select “Save” at the bottom. (Figure 4)

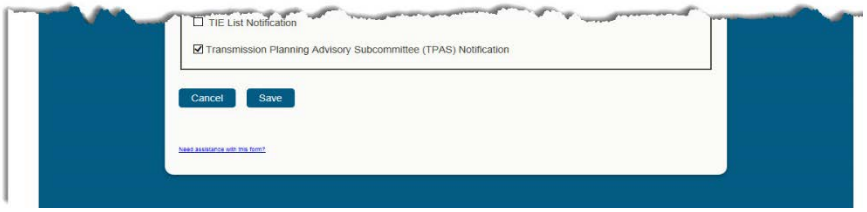


Figure 4

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.

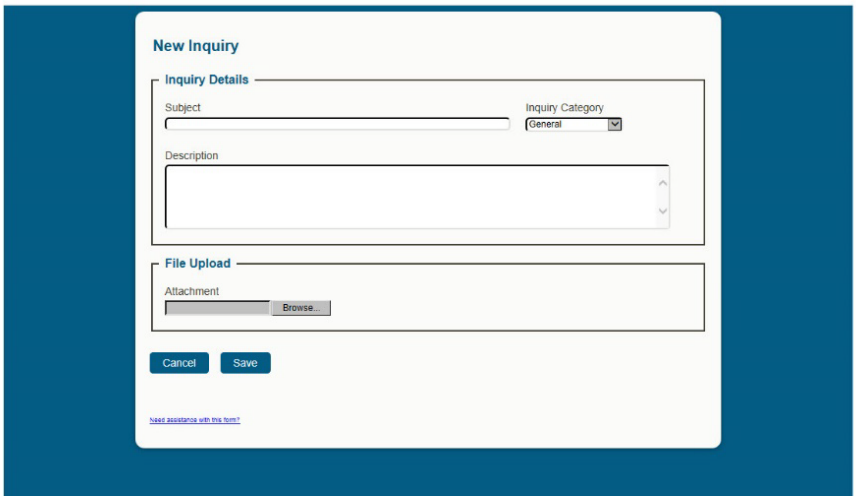


Figure 5

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.

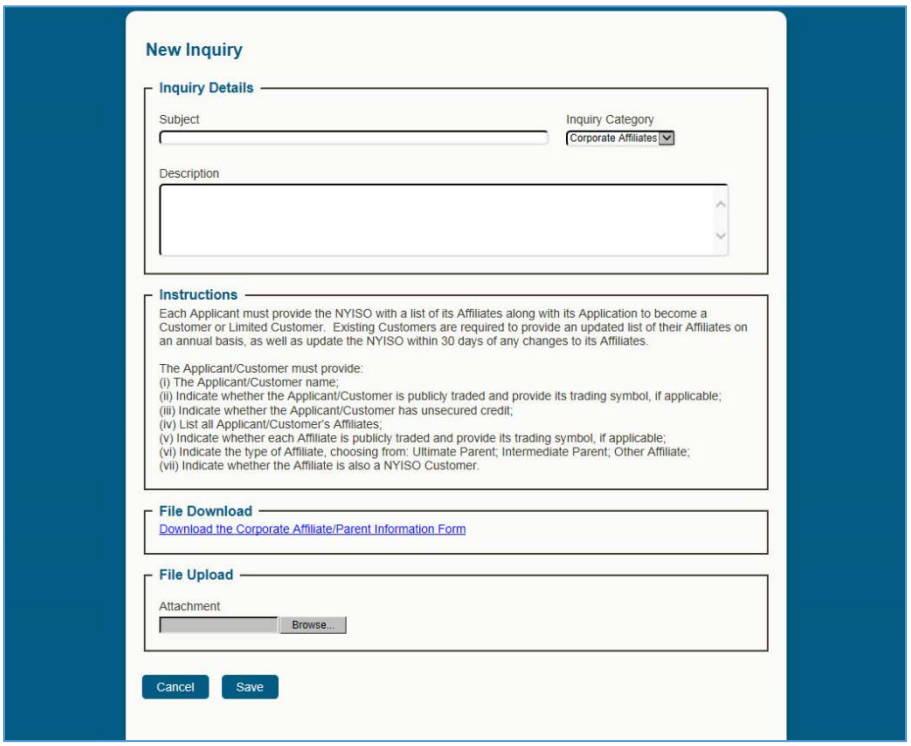


Figure 6

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.

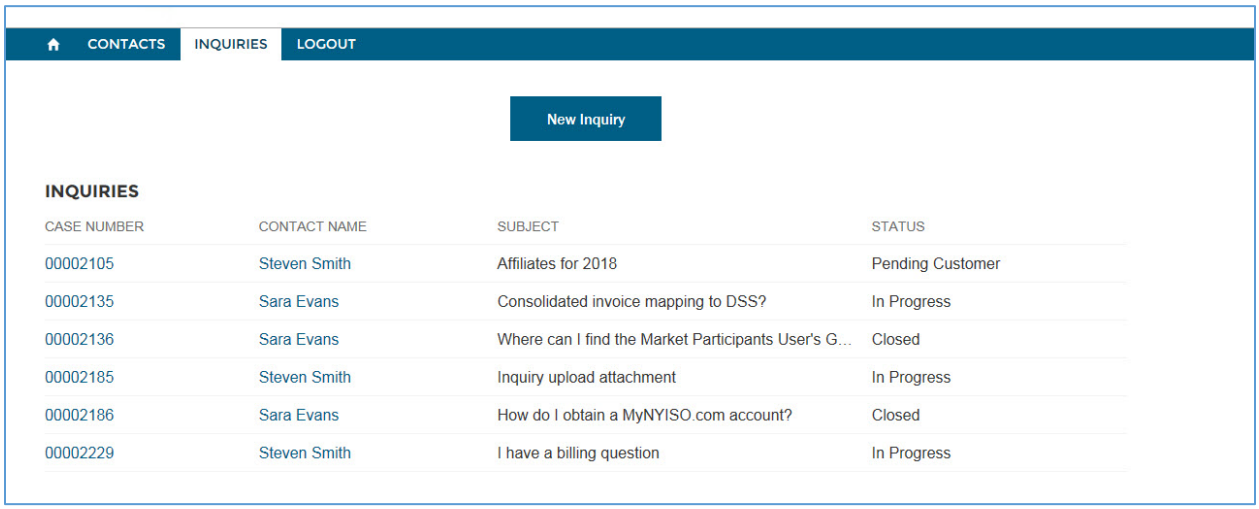


Figure 7

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.

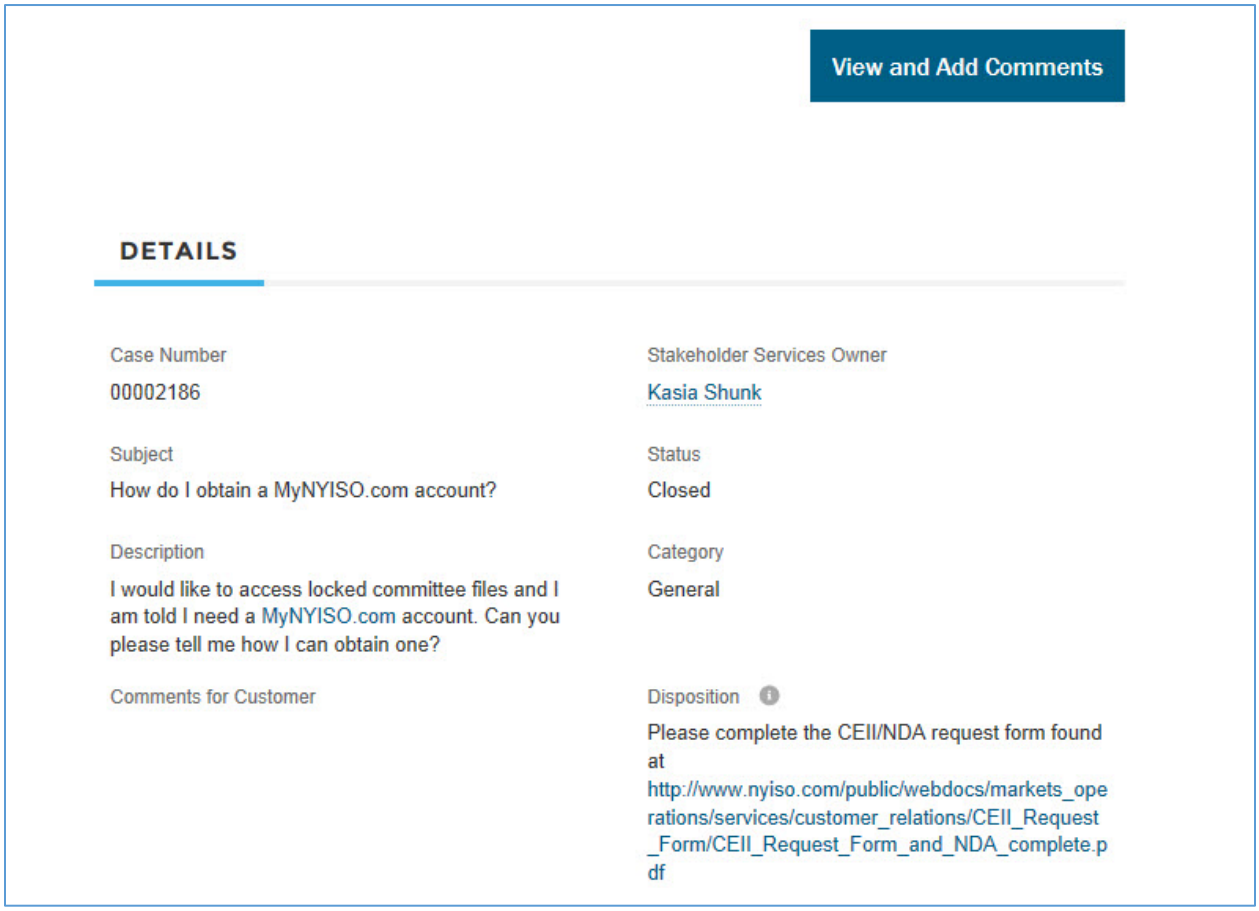


Figure 8

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.

Figure 9

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 Member Community Usage Agreement and Administrator Designation 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 https://nyiso.force.com/MemberCommunity/s/login/

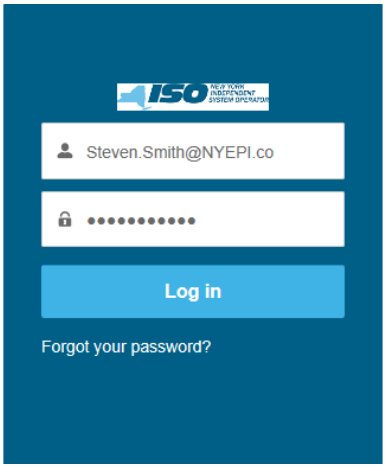


Figure 10

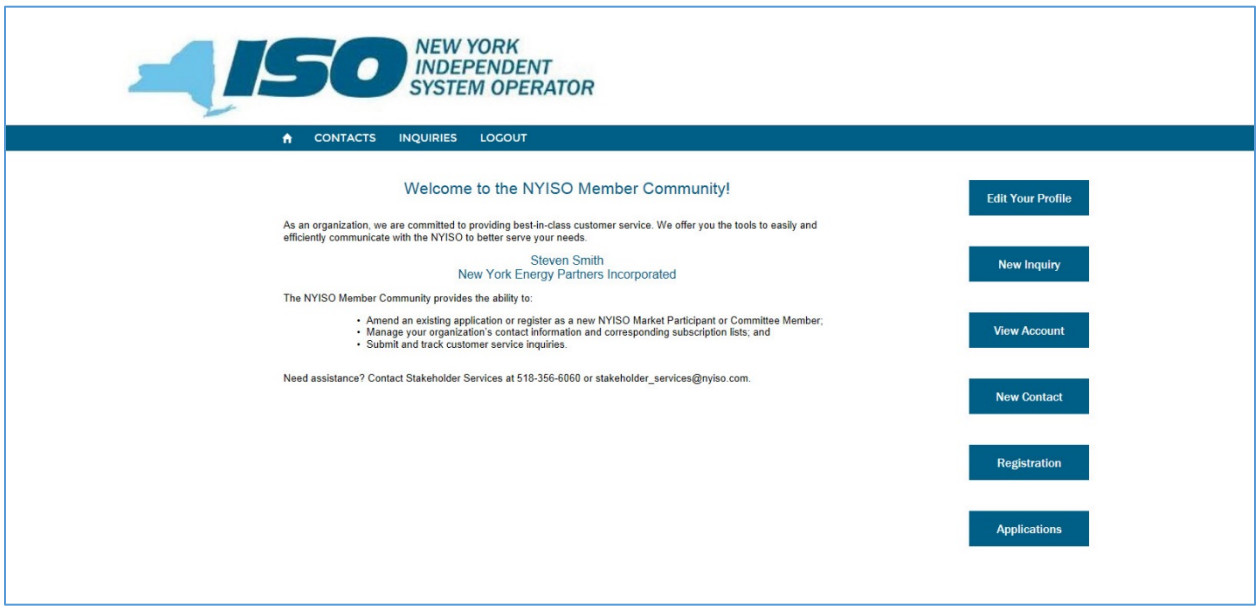


Figure 11

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.

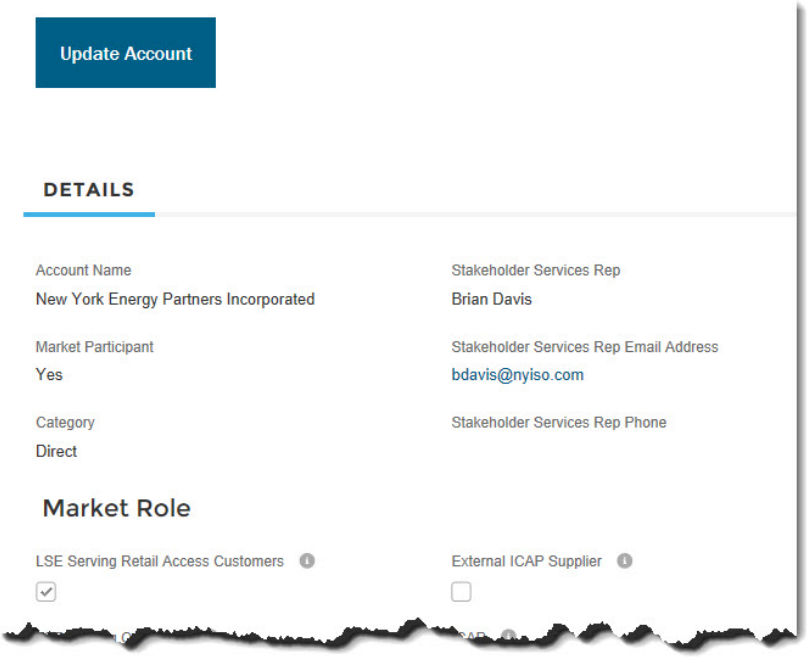
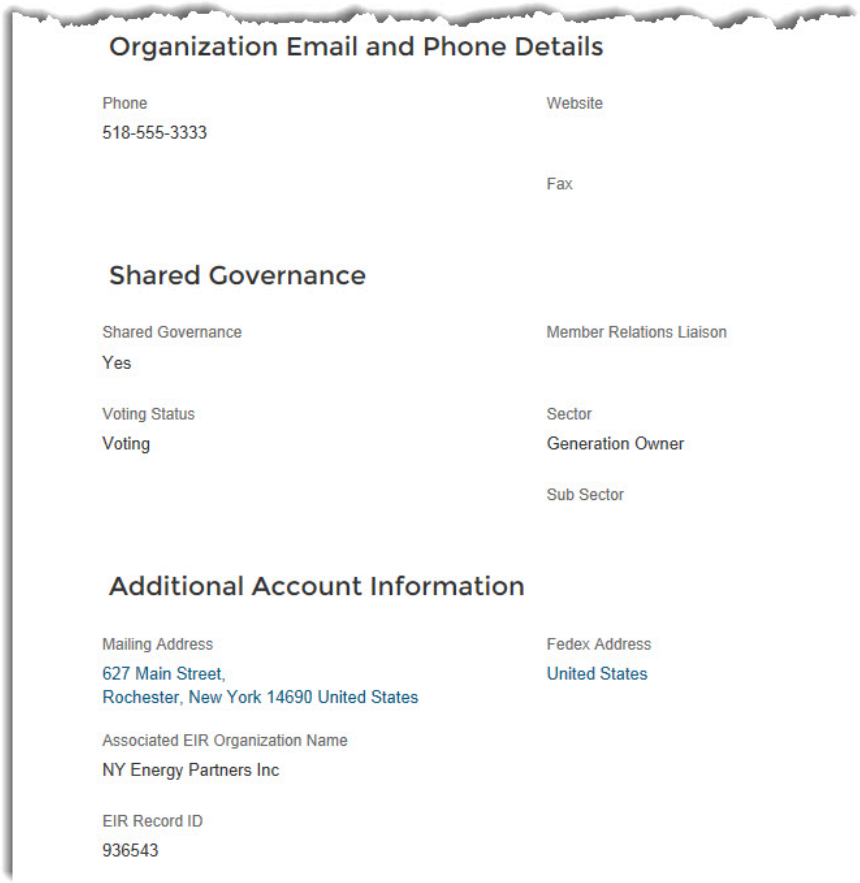

Update Account
DETAILS
Account Name
New York Energy Partners Incorporated
Stakeholder Services Rep
Brian Davis
Market Participant
Yes
Stakeholder Services Rep Email Address
bdavis@nyiso.com
Category
Direct
Stakeholder Services Rep Phone
Market Role
LSE Serving Retail Access Customers
External ICAP Supplier

Figure 12



Organization Email and Phone Details

Phone
518-555-3333

Website

Fax

Shared Governance

Shared Governance
Yes

Member Relations Liaison

Voting Status
Voting

Sector
Generation Owner

Sub Sector

Additional Account Information

Mailing Address
627 Main Street,
Rochester, New York 14690 United States

Fedex Address
United States

Associated EIR Organization Name
NY Energy Partners Inc

EIR Record ID
936543

Figure 12 (Con't)

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)

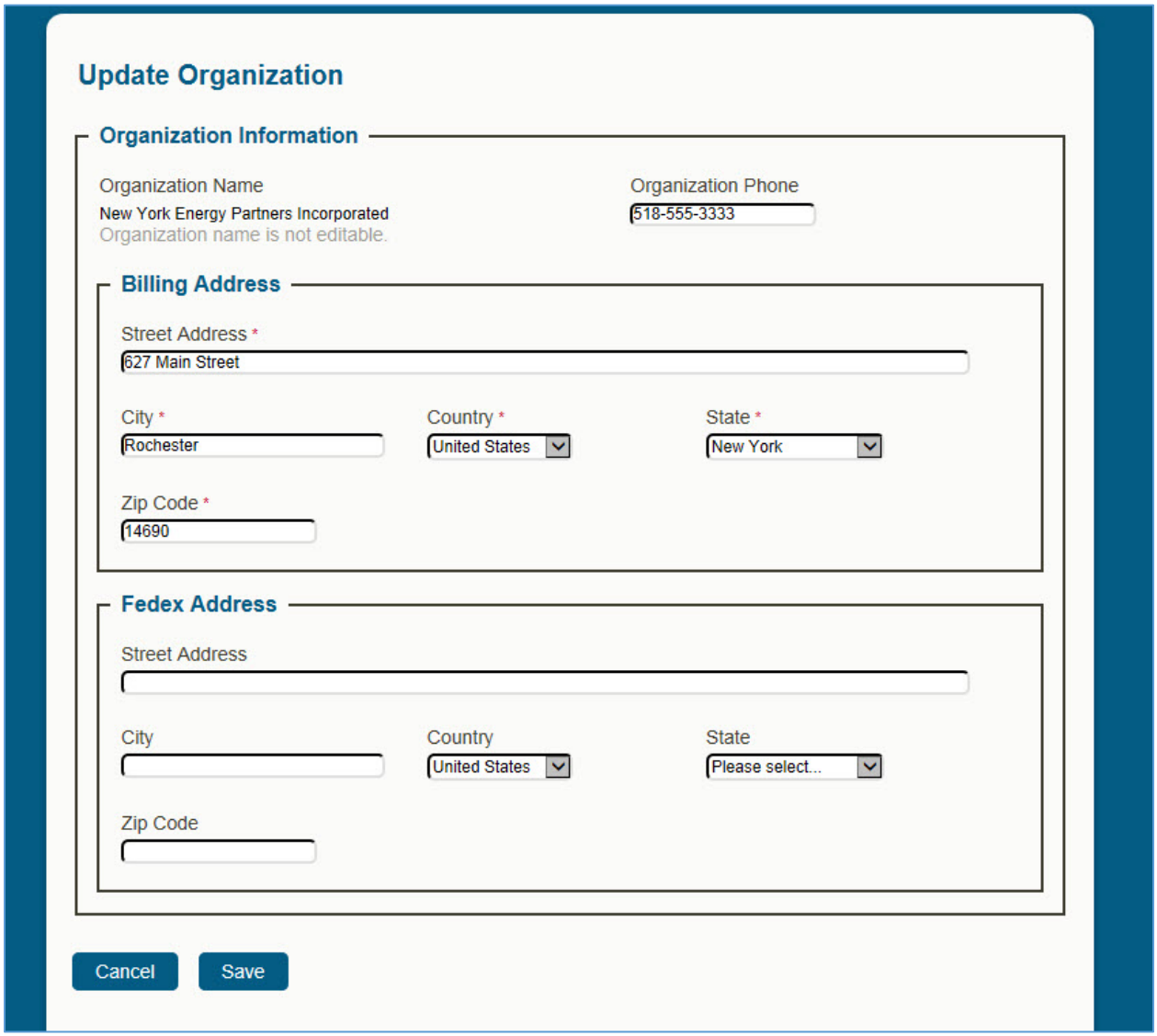


Figure 13

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)

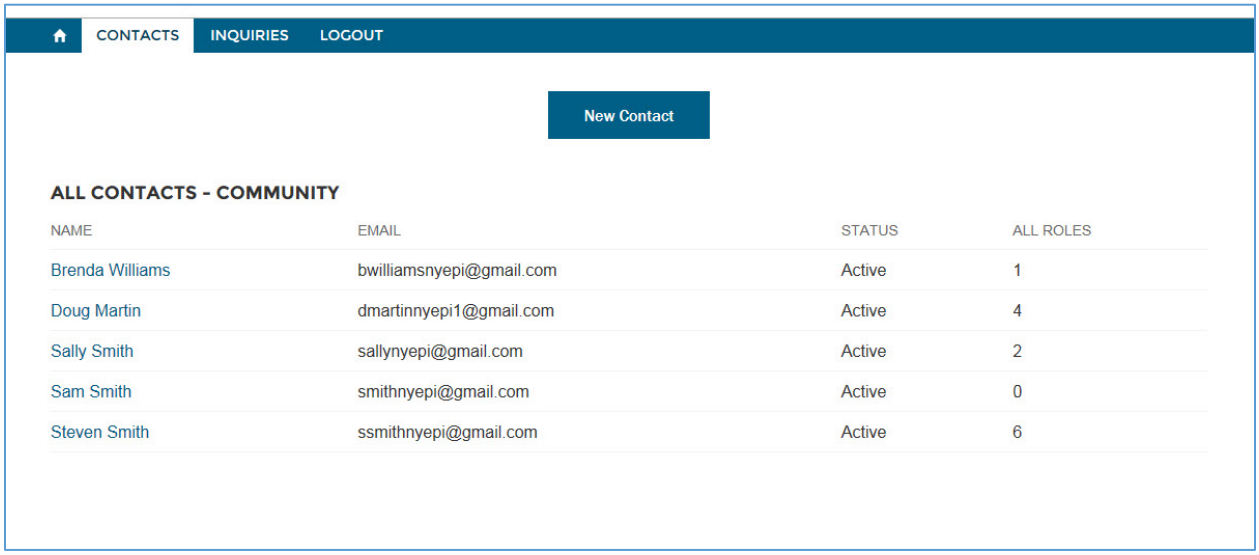


Figure 14

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.

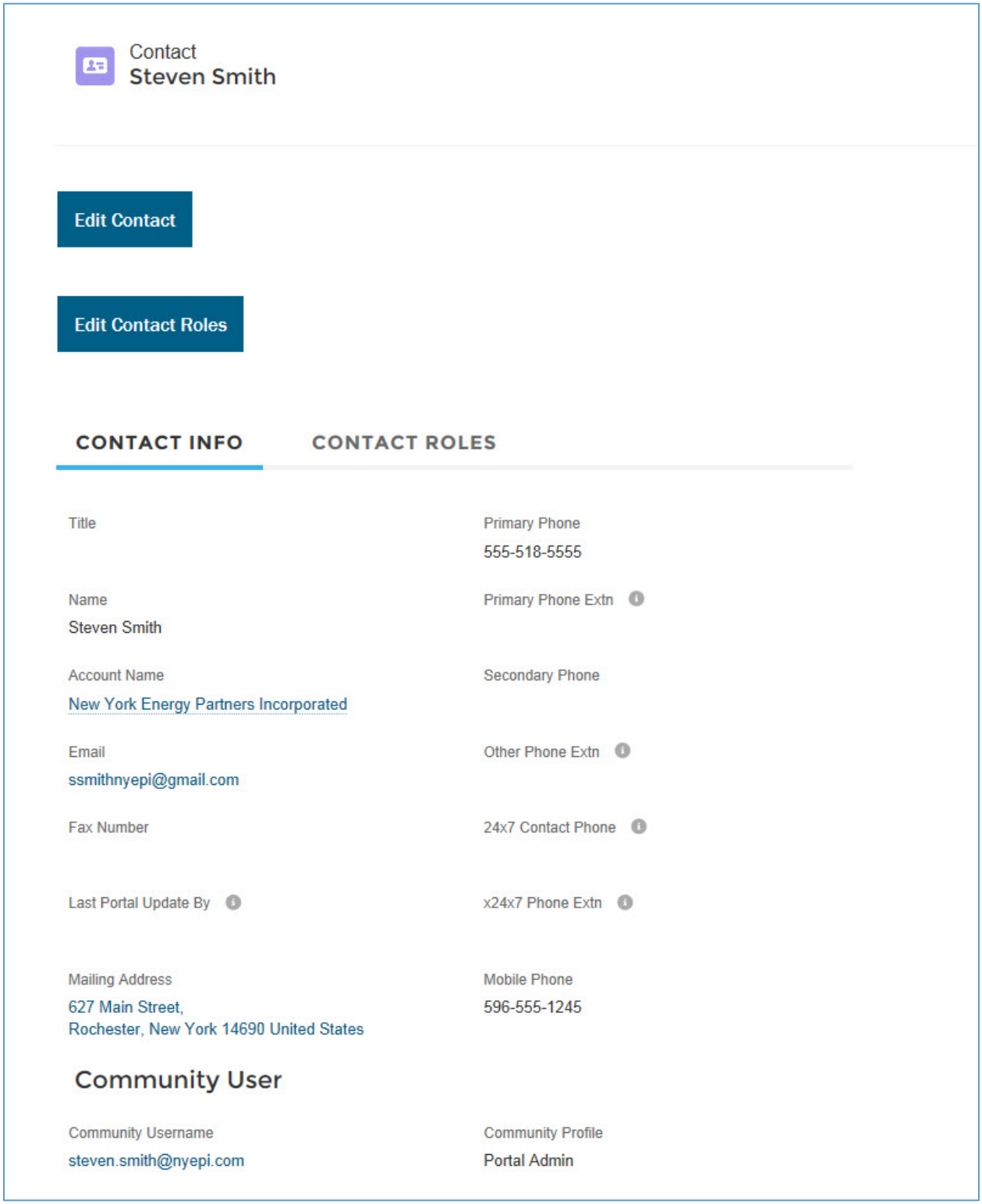

Contact
Steven Smith
Edit Contact
Edit Contact Roles
CONTACT INFO
CONTACT ROLES
Title
Primary Phone
555-518-5555
Name
Steven Smith
Primary Phone Extn
Account Name
New York Energy Partners Incorporated
Secondary Phone
Email
ssmithnyepi@gmail.com
Other Phone Extn
Fax Number
24x7 Contact Phone
Last Portal Update By
x24x7 Phone Extn
Mailing Address
627 Main Street,
Rochester, New York 14690 United States
Mobile Phone
596-555-1245
Community User
Community Username
steven.smith@nyepi.com
Community Profile
Portal Admin

Figure 15

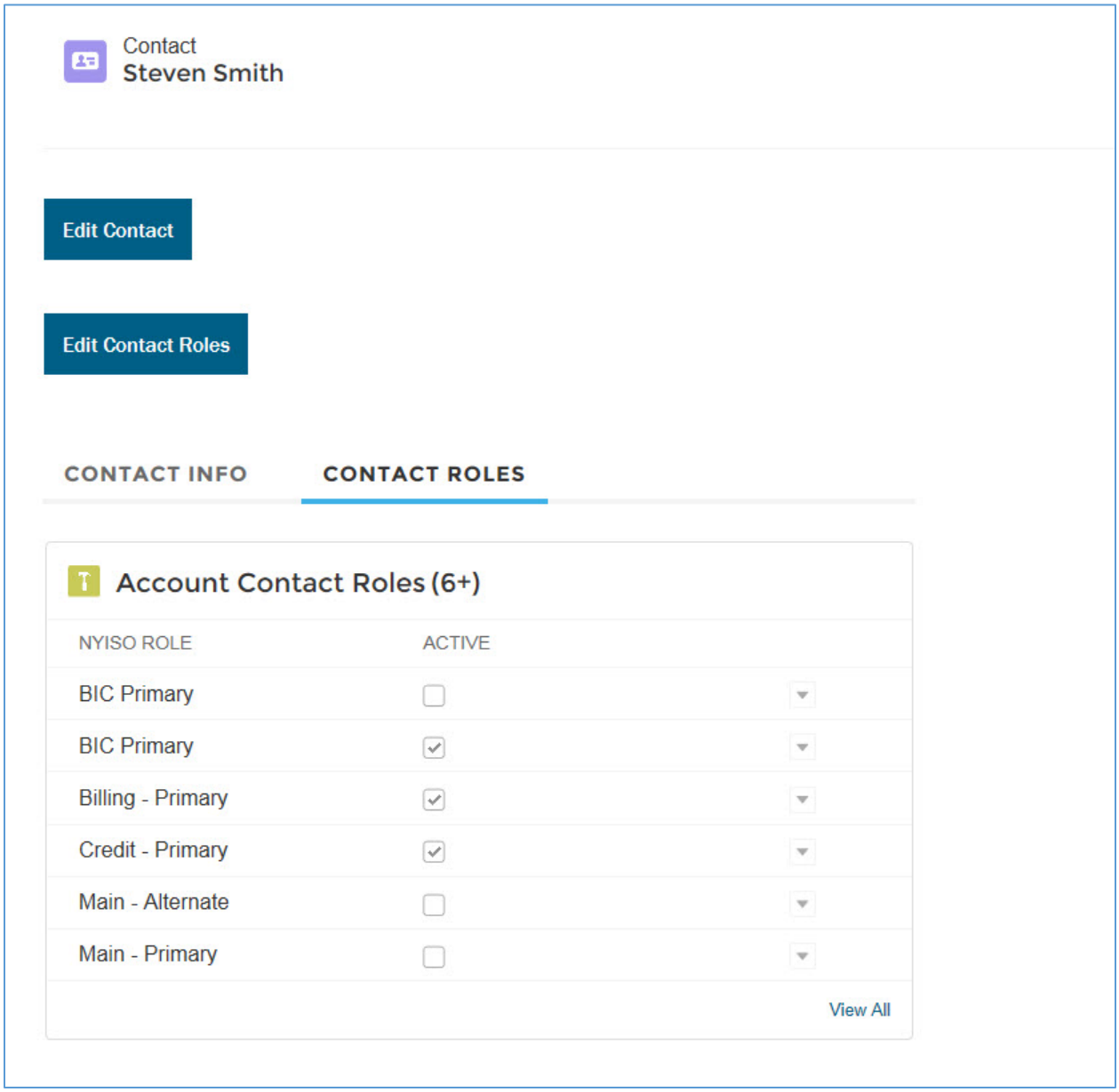

Contact
Steven Smith
Edit Contact
Edit Contact Roles
CONTACT INFO
CONTACT ROLES
Account Contact Roles (6+)
NYISO ROLE
ACTIVE
BIC Primary
BIC Primary
Billing - Primary
Credit - Primary
Main - Alternate
Main - Primary
View All

Figure 16

Updating Account Roles

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

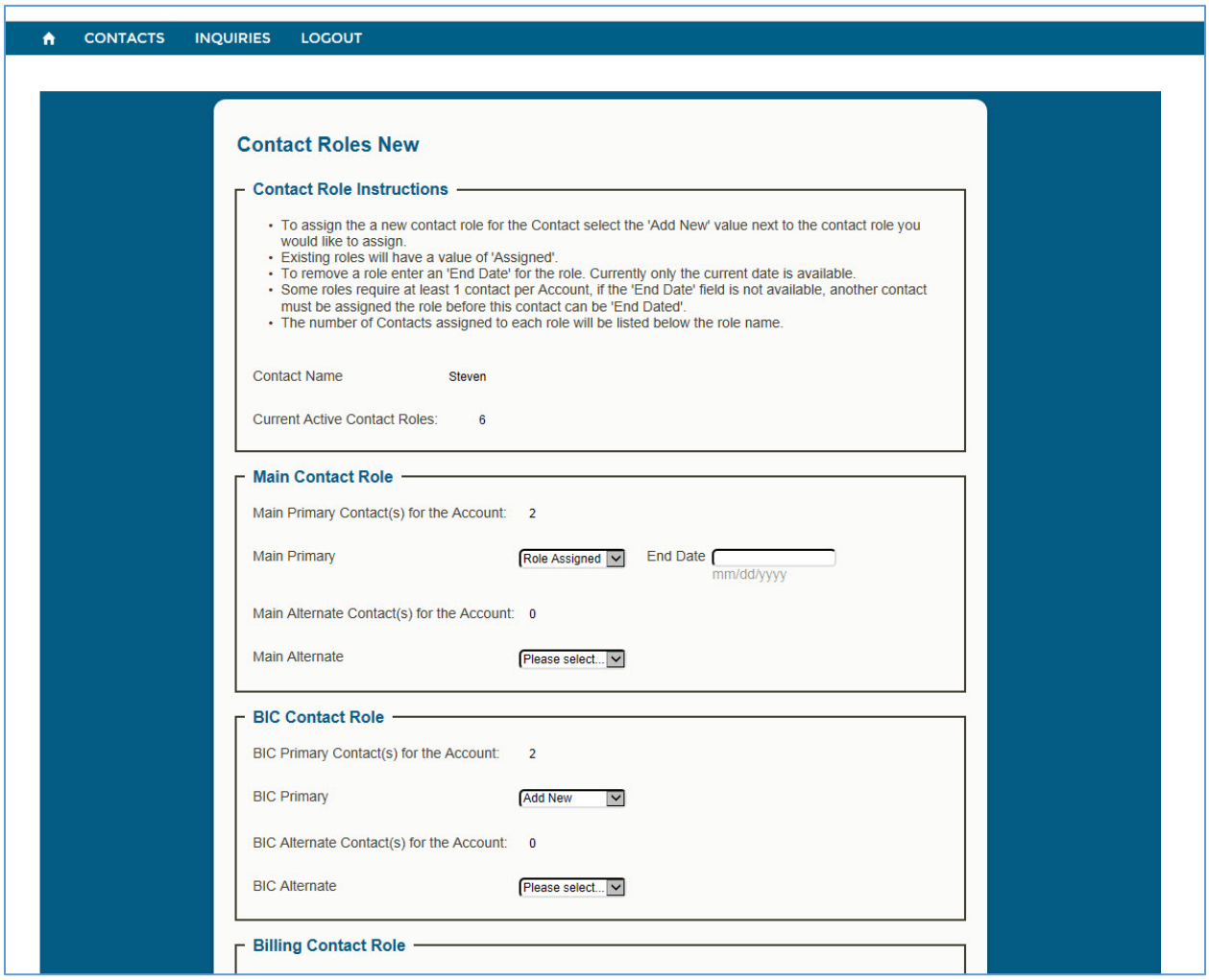


Figure 17

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)

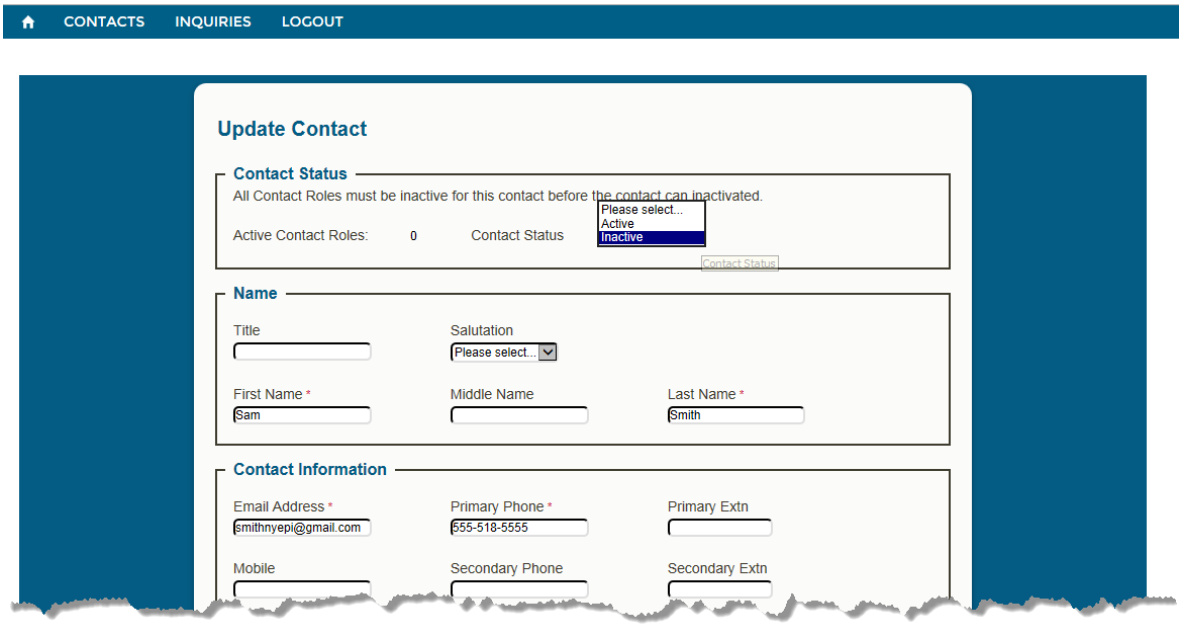


Figure 18

Inactivating a Contact with NYISO

1. Select "Edit Contact" from within the contact. (Figure 15)
2. Next to "Contact Status", there is an "inactive" option. (Figure 18) (If there is not an end date option, please review note here. 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.

Figure 19

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 Removing a Role from a Contact.

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 stakeholder_services@nyiso.com with any questions.