

# Interconnection Projects: Support, Communication & Tracking

May 15, 2023 Customer Focus Group Christopher Tamasi/ Mark Seibert

# **Customer Focus Groups**

- Purpose is to gather information and customer ideas to enhance the existing IP portal. These discussions will be focused on the IP portal usability and not intended to cover changes to the study process.
  - Visual Dashboards
  - Notifications of tasks and milestones
  - Additional functionality
  - Information needs
- Communicate planned enhancements to the IP Portal and customer support processes.



#### **Enhancements**

#### Completed

- Inquiry submission options IP Portal link, email and phone
  - Stakeholderservices IPSupport@nyiso.com
  - 518-356-6060 Option 2
- Interconnection Inquiry type & Inquiry Tab
- Dedicated Interconnection support liaisons
- Planning Project Managers
- Knowledge Article direct link
- Banking Instructions & W-9

#### In Process

Save in Progress

#### Feedback to date

 File included with Jan 25th meeting materials with feedback received to date



#### M272 - Interconnection Process Enhancements

#### Interconnection Portal Build upon Existing Functionality

- Create ability to submit
   Customer Inquiry from IP portal
- Provide Banking Information
- Provide TO Access
- Leverage Dashboards
- Set up notifications for key dates, status changes, tasks.

# <u>Project Management</u> New Functionality Needed – Salesforce Native App

- Project Task & Milestone Tracking
- Scheduling tool with estimate timeline
- Resource Allocation
- Data analytics



Document Storage

#### Customer Inquiry Leverage Existing Functionality

- Build Inquiry type to manage and report on these inquiries
- Stakeholder Services triage ALL incoming inquiries & escalate to PM or Tech Lead, as needed
- Identify repetitive questions to write Knowledge Articles

Management Risk Mitigation

#### Knowledge Base Leverage Existing Functionality

- Create Knowledge Articles to address common questions
- Provide Customers on-demand access to Interconnection information

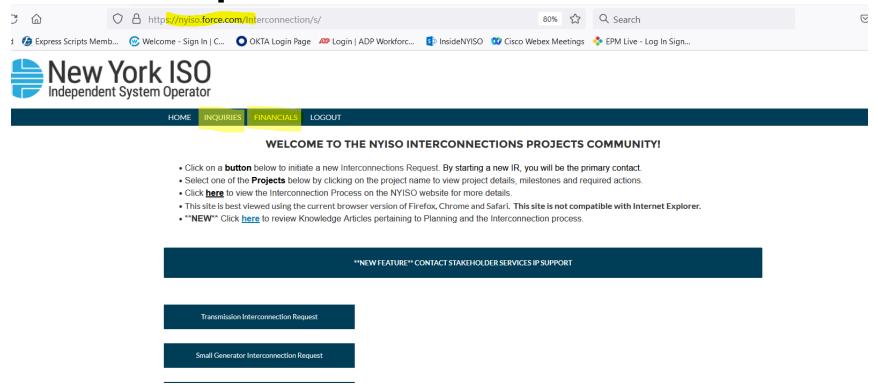
# **Next Steps**

- Implementation of Salesforce Native App for Project Management functionality
- Periodic updates of enhancements & Process Changes
- Continued discussions of other interconnection process improvements and tariff revisions as part of the 2023 Interconnection Queue Reform
  - Q1-Q3: Discussions and development/review of proposals and tariff revisions in TPAS
  - Q4: Stakeholder Approvals
  - 2024:Board Approvals & Section 205 filing with FERC



# Appendix









The following is the New York Independent System Operator's electronic payment instructions:

Bank

Albany, NY 12207

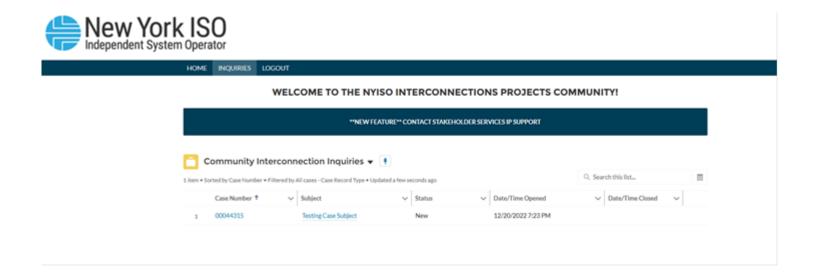
ABA#:

Account #:

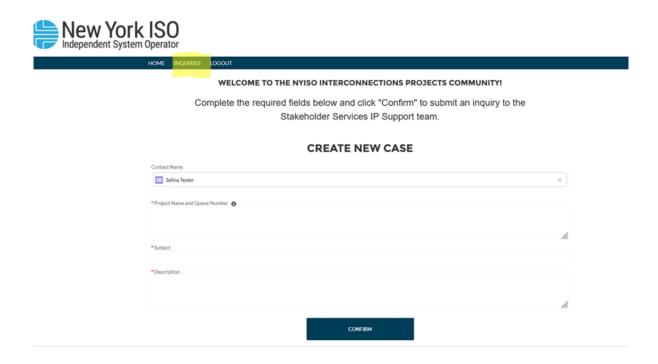
Include the project name and que number in the additional comments/reference fields, as this will allow for quicker identification and processing.

NYISO's W-9











# Questions?

