

Secure Communications Portal

Kelly Stegmann

Senior Market Trainer, Market Training, NYISO
Online Training Module

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Remote Learning

Presentation Outline

- **Background**
- **Accessing the Secure Communications Portal**
- **User Types and Notifications**
- **Navigation of Secure Communications Portal**
- **Creating a New Consultation Request**
- **User Management for Primary and Secondary Contacts**

Background

Secure Communication Portal

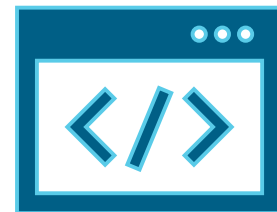
Overview

- **Secure method for Market Mitigation & Analysis (MMA) and Market Participants (MPs) to communicate confidential information**
 - Allows MPs to create and update consultation requests while collaborating with the NYISO team.

Accessing the Secure Communications Portal

Accessing the Secure Communications Portal

- **Users will receive a welcome email which includes their username and a link to portal to set their password.**
 - Users will be prompted to set up Multi-Factor Authentications (MFA) on their next login attempt after initial set up.
- **All email notifications will include a link to access the Secure Communications Portal.**



User Types and Notifications

User Types

	Primary and Secondary Organization Contact	Primary and Secondary Generator Contact
Can submit consultation requests	Y	Y
Can add notes and attach files to assigned consultation request	Y	Y
Can view all consultation requests applicable to organization	Y	N
Will be notified (via email) of every consultation request created associated with organization	Y	N
Will be notified (via email) that the NYISO has responded to assigned consultation request	Y	Y
Will be notified (via email) that the NYISO has responded to all consultation requests associated with organization	Y	N
Can reassign consultation requests to another user	Y	Y
Can deactivate users of the Secure Communications Portal	Y	Y

User Types

	Primary and Secondary Organization Contact	Primary and Secondary Generator Contact	Delegate
Can submit consultation requests	Y	Y	Y
Can add notes and attach files to assigned consultation request	Y	Y	Y
Can view all consultation requests applicable to organization	Y	N	N
Will be notified (via email) of every consultation request created associated with organization	Y	N	N
Will be notified (via email) that the NYISO has responded to assigned consultation request	Y	Y	Y
Will be notified (via email) that the NYISO has responded to all consultation requests associated with organization	Y	N	N
Can reassign consultation requests to another user	Y	Y	N
Can deactivate users of the Secure Communications Portal	Y	Y	N

Notifications

Notification of Consultation Request # CR-62

  Tue 12/17/2024 3:18 PM

 We could not verify the identity of the sender. Click here to learn more.
The actual sender of this message is different than the normal sender. Click here to learn more.

Dear 

Consultation request # CR-62 for  has been assigned to you. Please log into the NYISO Secure Communications Portal to view the consultation request.



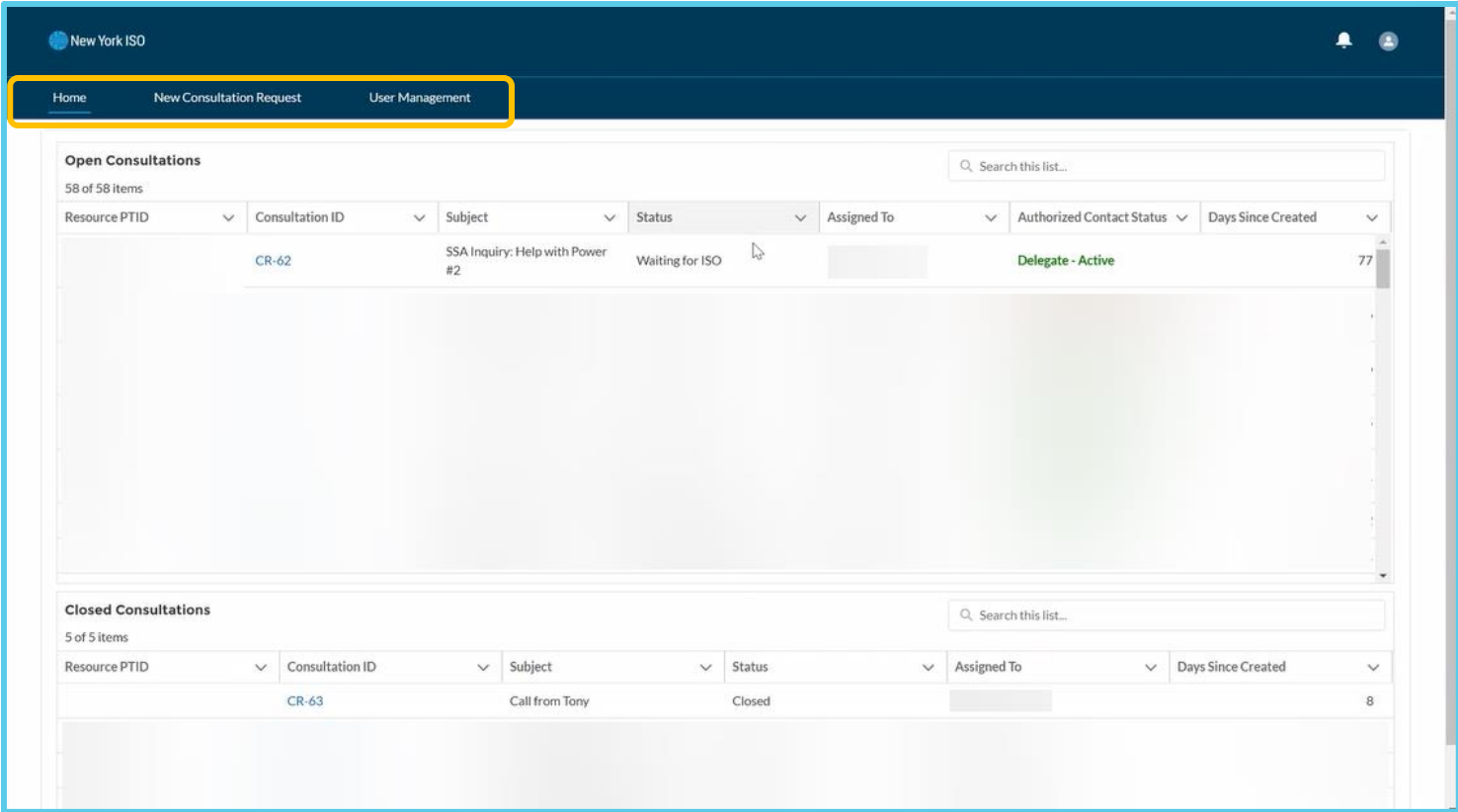
Having trouble logging in? Please contact NYISO Stakeholder Services at stakeholder_services@nyiso.com

Regards,
NYISO Stakeholder Services

There is no proprietary information shared in the email notifications. They are simply notifications with a hyperlink pointing users to log-in to the Secure Communications Portal to view the changes.

Navigation of Secure Communications Portal

Home Page Navigation



The screenshot shows the New York ISO Home Page. At the top, there is a dark blue navigation bar with the New York ISO logo on the left and a notification bell and user profile icon on the right. Below the navigation bar, three menu items are visible: "Home", "New Consultation Request", and "User Management". The "Home" menu item is highlighted with a yellow border.

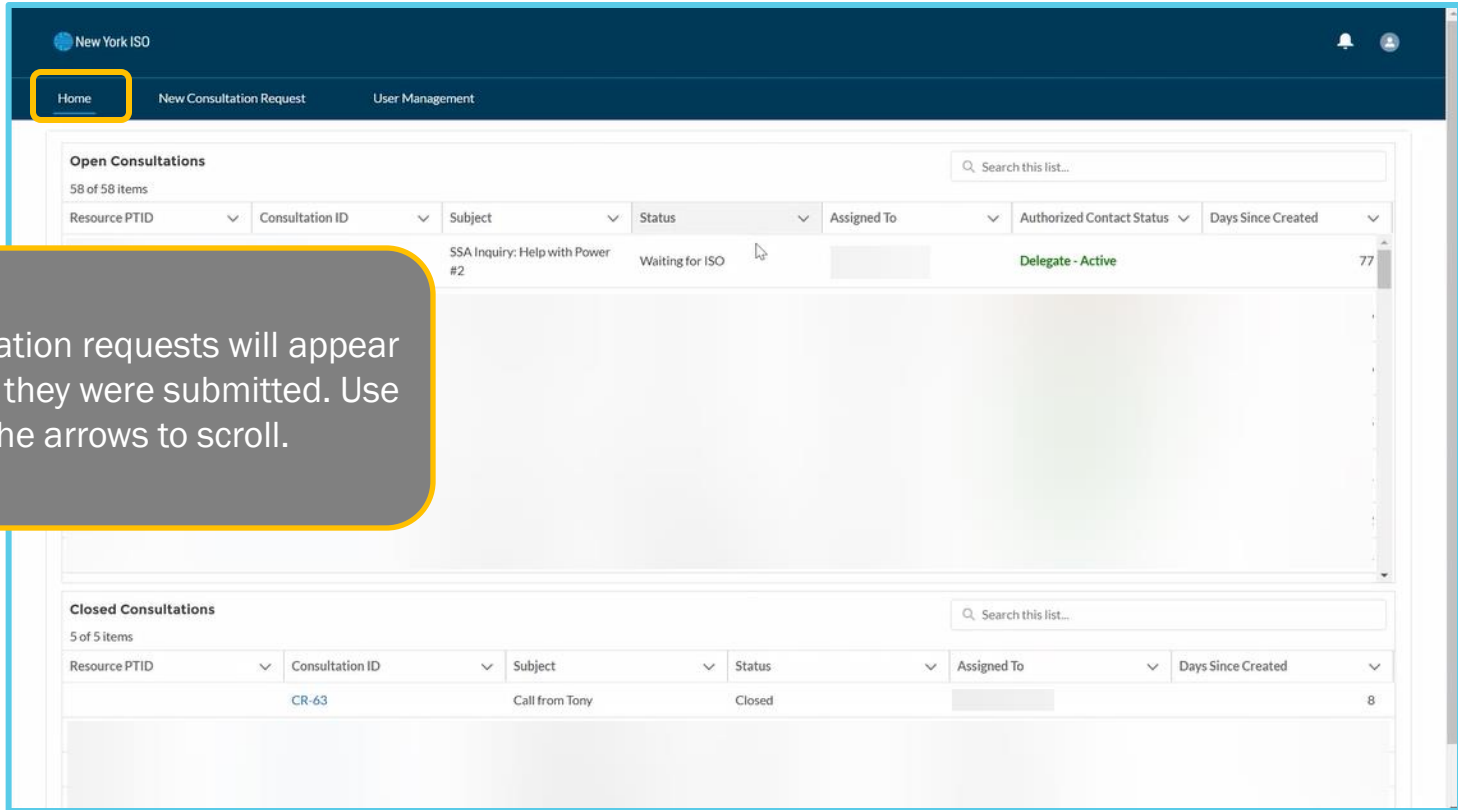
Below the navigation bar, there are two data tables. The first table is titled "Open Consultations" and shows 58 of 58 items. It has a search bar and a table with the following columns: Resource PTID, Consultation ID, Subject, Status, Assigned To, Authorized Contact Status, and Days Since Created. The first row of data is:

Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
	CR-62	SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

The second table is titled "Closed Consultations" and shows 5 of 5 items. It has a search bar and a table with the following columns: Resource PTID, Consultation ID, Subject, Status, Assigned To, and Days Since Created. The first row of data is:

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

Home Page Navigation



Home New Consultation Request User Management

Open Consultations Search this list...

58 of 58 items

Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
		SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

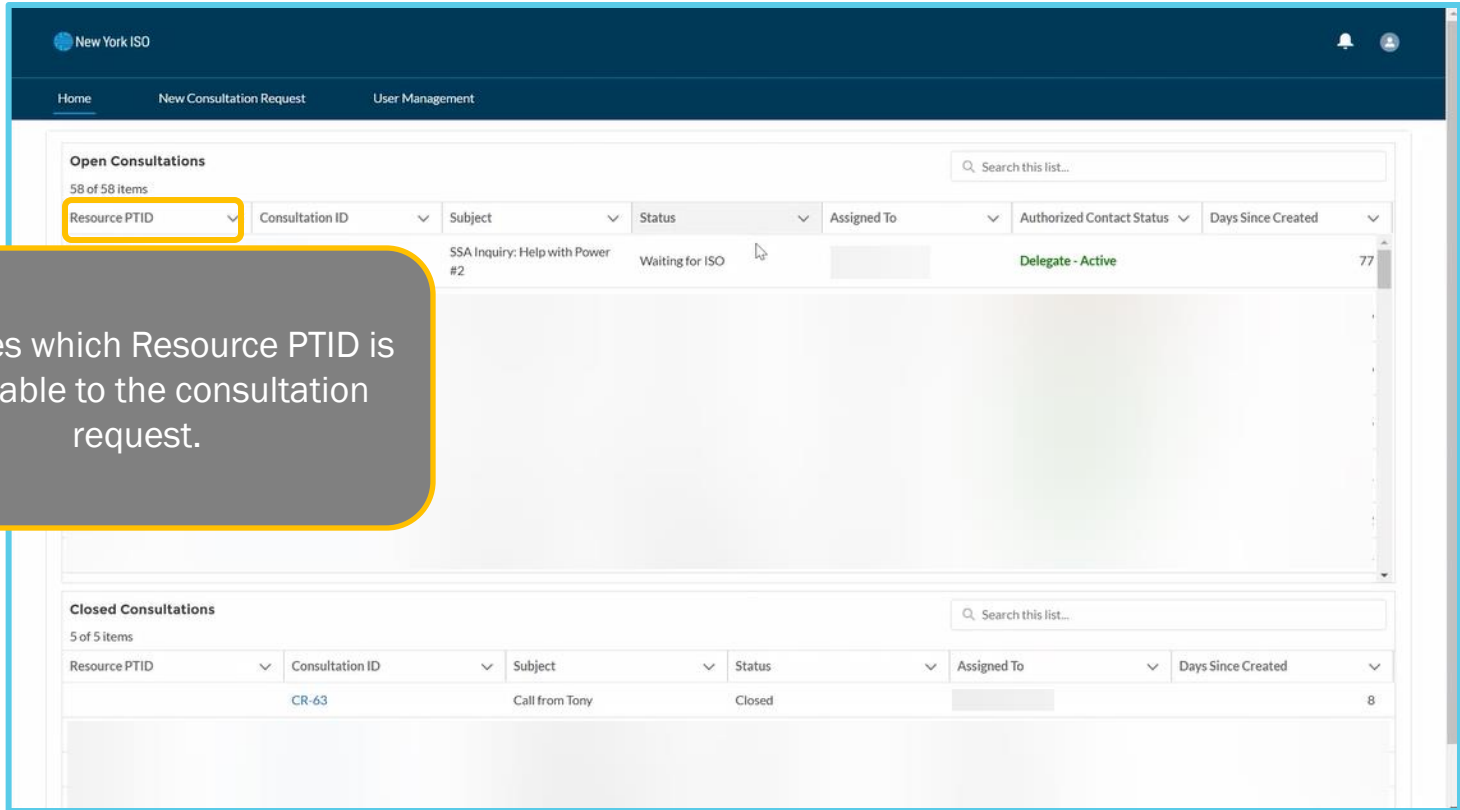
Closed Consultations Search this list...

5 of 5 items

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

Consultation requests will appear in order they were submitted. Use the arrows to scroll.

Home Page Navigation



The screenshot shows the New York ISO Home Page with a dark blue header containing the logo and navigation tabs: Home, New Consultation Request, and User Management. Below the header, there are two main sections: 'Open Consultations' and 'Closed Consultations'. Each section has a search bar and a table of items. In the 'Open Consultations' section, the 'Resource PTID' column header is highlighted with a yellow box. A callout box points to this header with the text: 'Indicates which Resource PTID is applicable to the consultation request.' The 'Open Consultations' table shows one item with the following details:

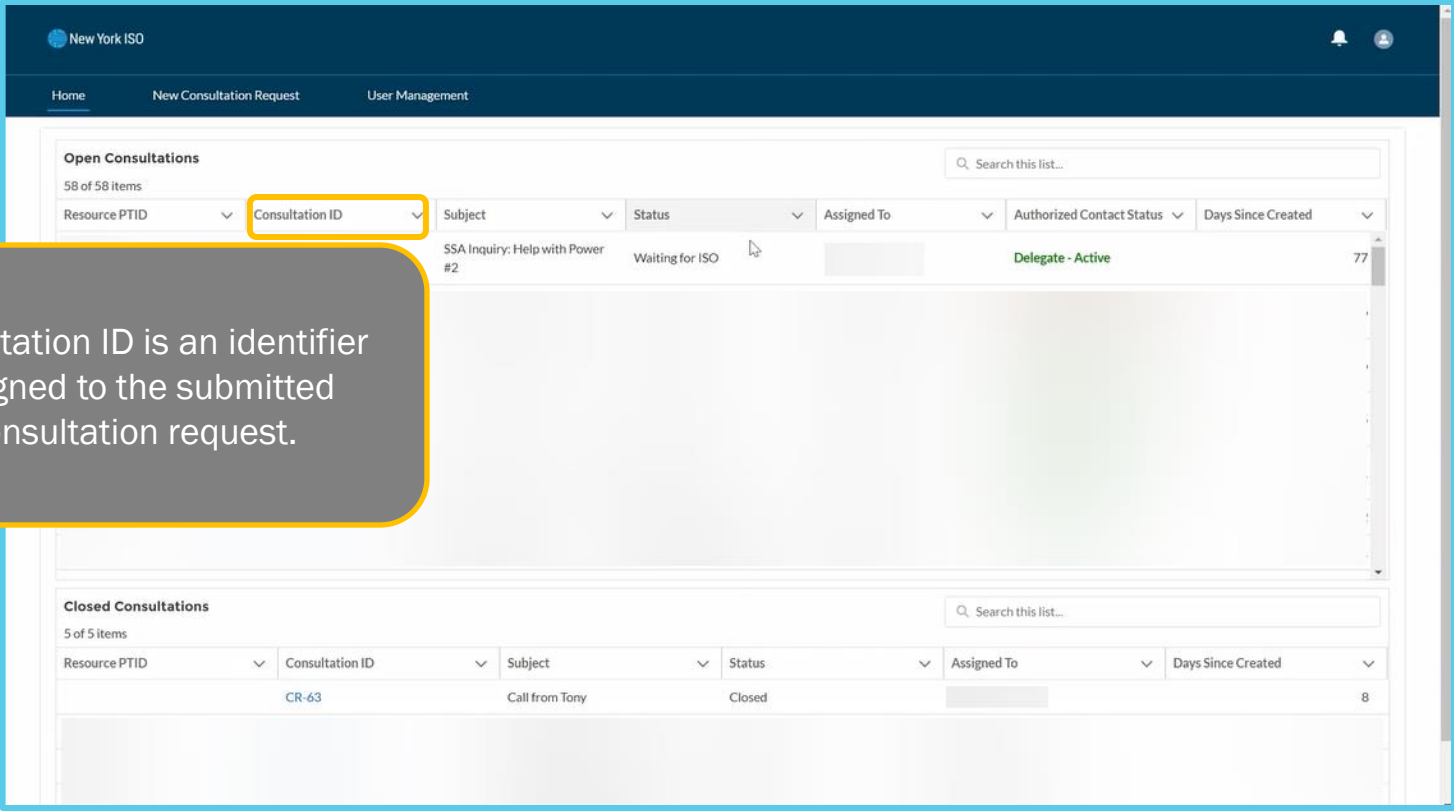
Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
		SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

The 'Closed Consultations' section shows a table with the following details:

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

Indicates which Resource PTID is applicable to the consultation request.

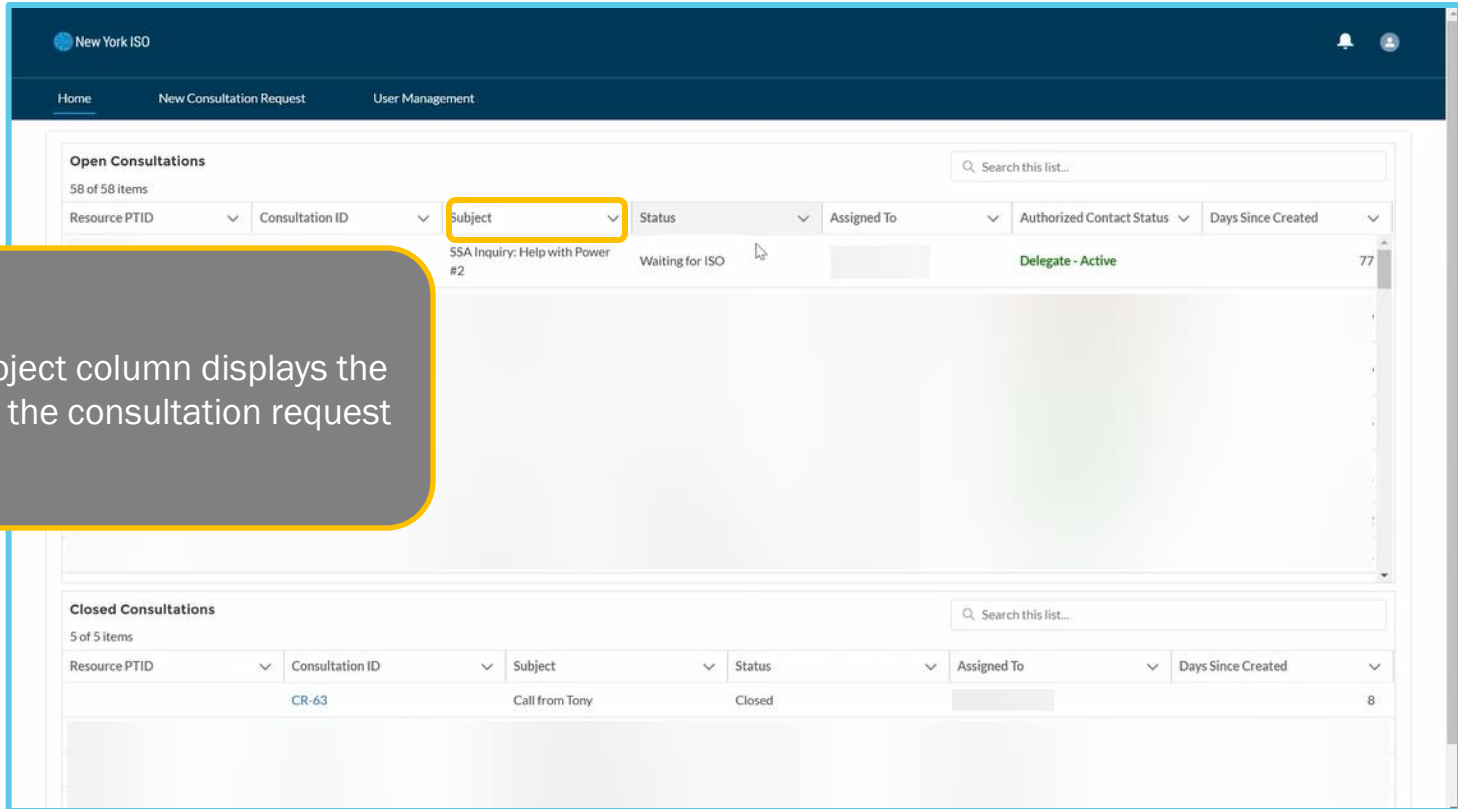
Navigation



The screenshot shows a web application interface for New York ISO. At the top, there is a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. Below this, there are two main sections: 'Open Consultations' and 'Closed Consultations'. Each section has a search bar and a table of items. In the 'Open Consultations' section, the 'Consultation ID' column header is highlighted with a yellow box. The table below it shows a single row with the following data: Resource PTID (blank), Consultation ID (blank), Subject 'SSA Inquiry: Help with Power #2', Status 'Waiting for ISO', Assigned To (blank), Authorized Contact Status 'Delegate - Active', and Days Since Created '77'. The 'Closed Consultations' section shows a table with one row: Resource PTID (blank), Consultation ID 'CR-63', Subject 'Call from Tony', Status 'Closed', Assigned To (blank), and Days Since Created '8'.

Consultation ID is an identifier assigned to the submitted consultation request.

Home Page Navigation



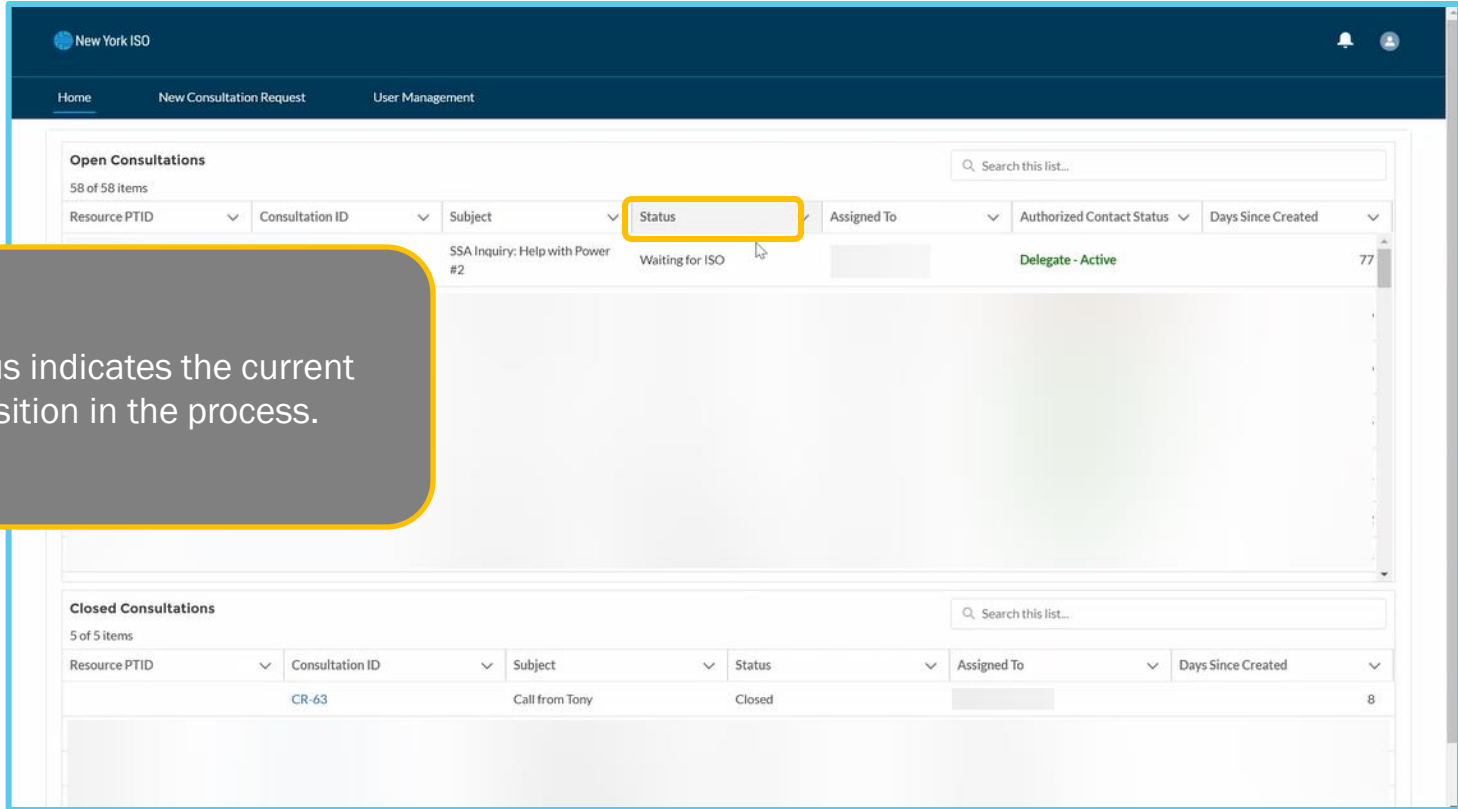
The screenshot displays the New York ISO Home Page. At the top, there is a navigation bar with the New York ISO logo and three menu items: Home, New Consultation Request, and User Management. Below the navigation bar, the page is divided into two main sections: Open Consultations and Closed Consultations. Each section has a search bar and a table of consultation requests. The Open Consultations section shows 58 of 58 items, and the Closed Consultations section shows 5 of 5 items. The Subject column in both tables is highlighted with a yellow box, indicating that it displays the topic of the consultation request.

Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
		SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

The subject column displays the topic of the consultation request

Home Page Navigation



The screenshot displays the New York ISO Home Page. At the top, there is a dark blue navigation bar with the New York ISO logo on the left and notification and user icons on the right. Below this, a secondary navigation bar contains three tabs: "Home" (which is active), "New Consultation Request", and "User Management".

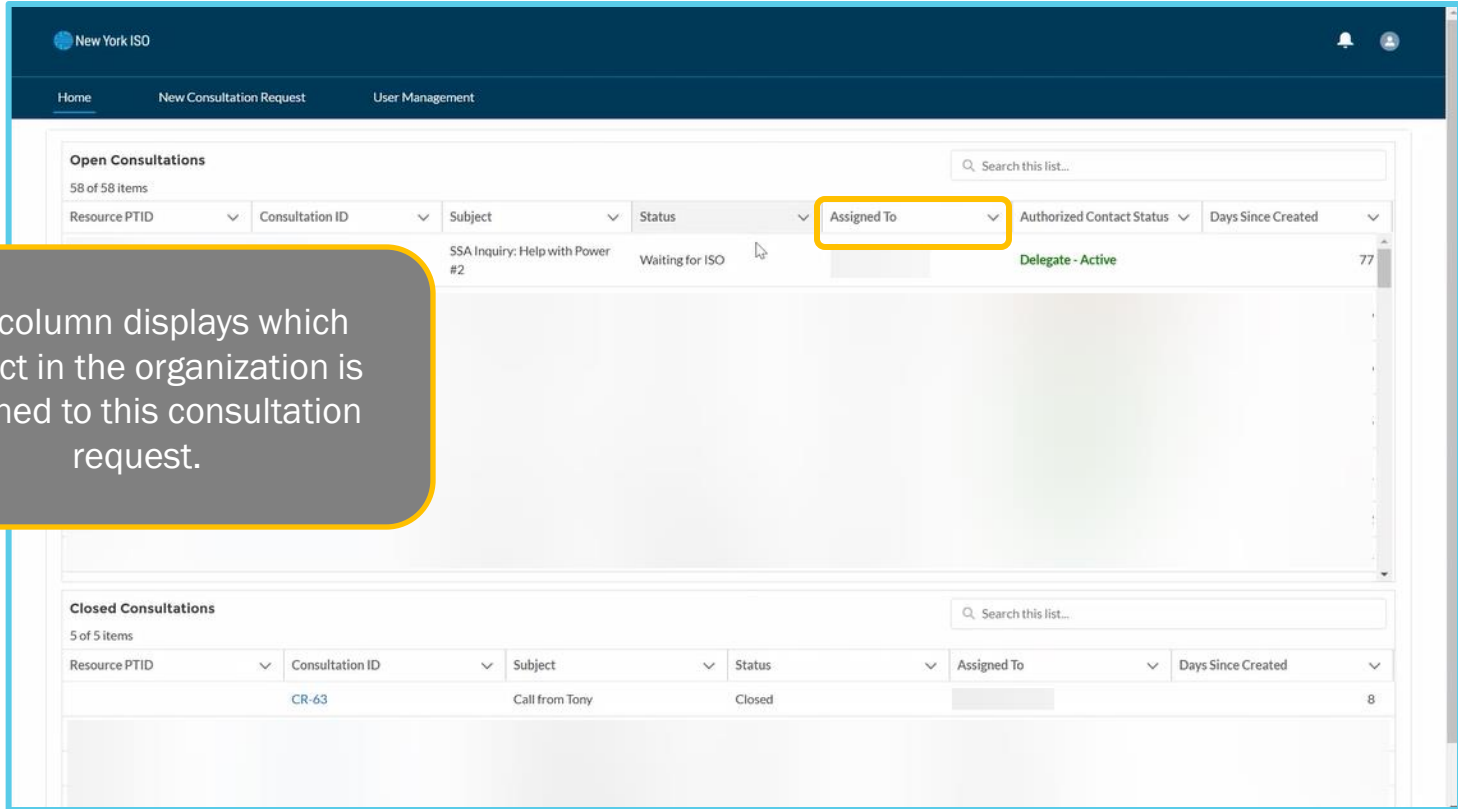
The main content area is divided into two sections: "Open Consultations" and "Closed Consultations".

Open Consultations: This section shows a list of 58 items. A search bar is present with the placeholder text "Search this list...". The table has columns for "Resource PTID", "Consultation ID", "Subject", "Status", "Assigned To", "Authorized Contact Status", and "Days Since Created". The "Status" column header is highlighted with a yellow box. A row is visible with the following data: "SSA Inquiry: Help with Power #2", "Waiting for ISO", a greyed-out "Assigned To" field, "Delegate - Active", and "77".

Closed Consultations: This section shows a list of 5 items. It also has a search bar with the placeholder text "Search this list...". The table has the same columns as the Open Consultations table. A row is visible with the following data: "CR-63", "Call from Tony", "Closed", a greyed-out "Assigned To" field, and "8".

Status indicates the current position in the process.

Home Page Navigation

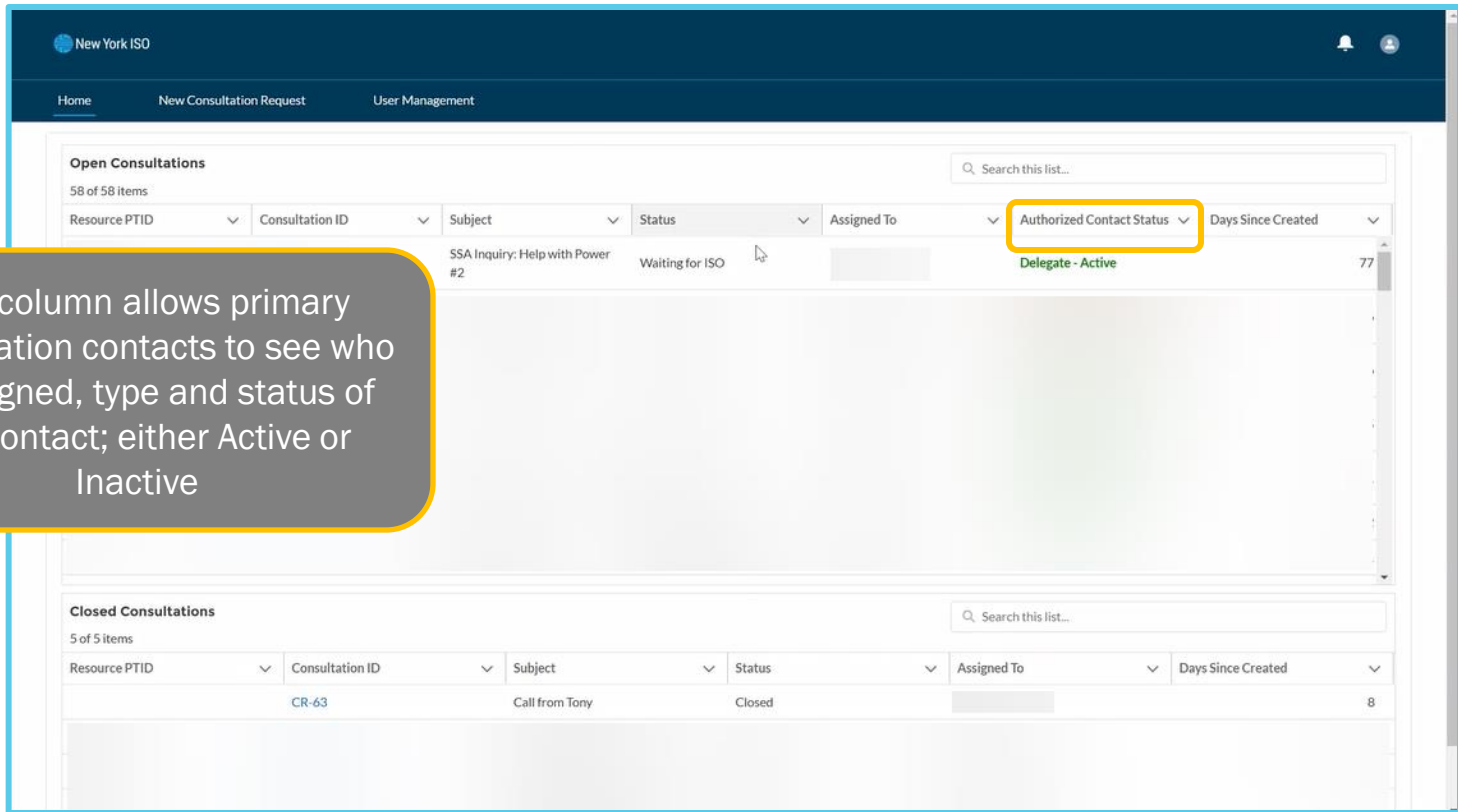


The screenshot displays the New York ISO Home Page interface. At the top, there is a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. Below this, there are two main sections: 'Open Consultations' and 'Closed Consultations'. Each section has a search bar and a table of items. The 'Open Consultations' table has 58 items, and the 'Closed Consultations' table has 5 items. The 'Assigned To' column in the 'Open Consultations' table is highlighted with a yellow box.

Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
		SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77
	CR-63	Call from Tony	Closed			8

This column displays which contact in the organization is assigned to this consultation request.

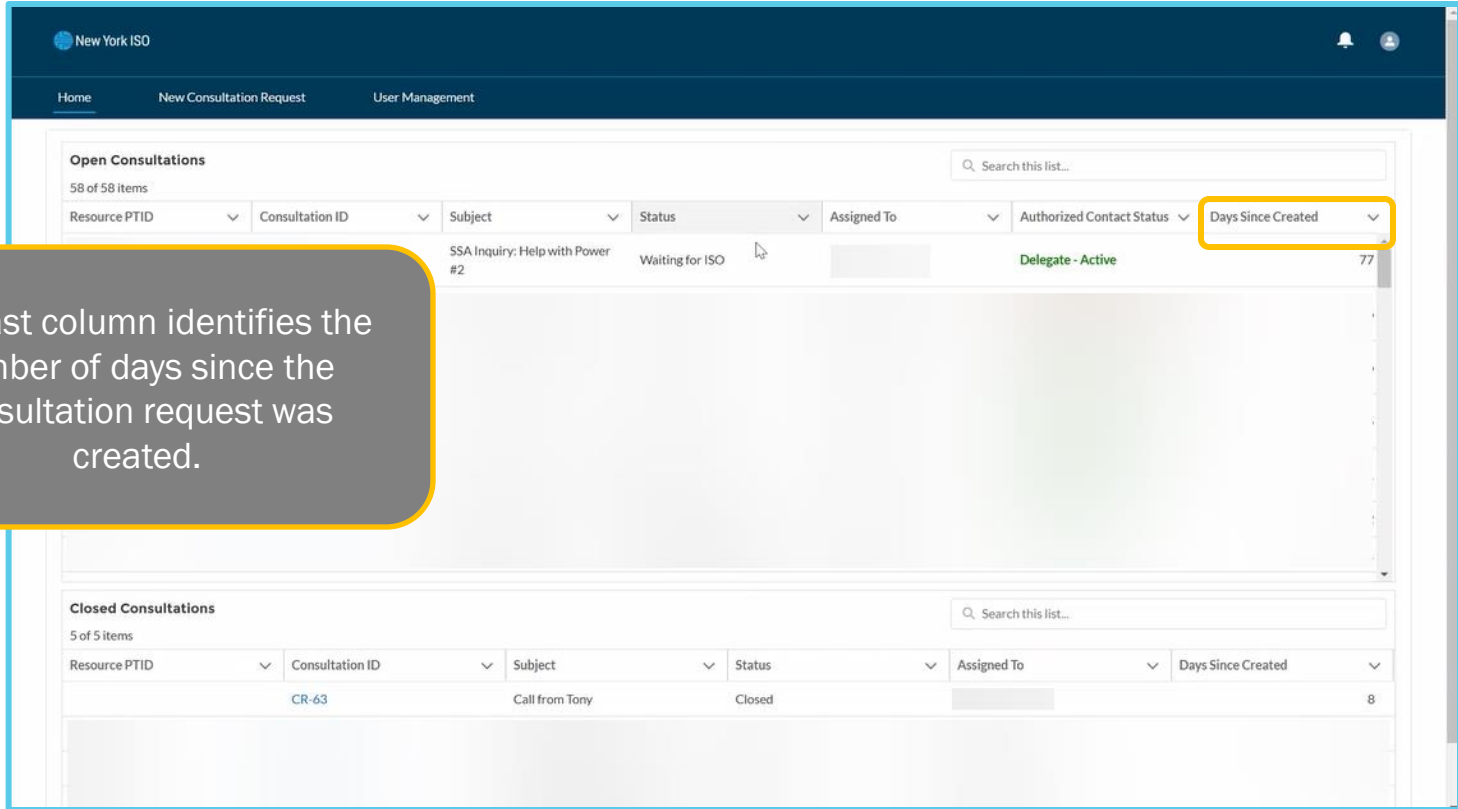
Home Page Navigation



The screenshot displays the New York ISO Home Page interface. At the top, there is a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. Below this, the 'Open Consultations' section shows a table with 58 items. The table columns are: Resource PTID, Consultation ID, Subject, Status, Assigned To, Authorized Contact Status (highlighted with a yellow box), and Days Since Created. A sample row shows 'SSA Inquiry: Help with Power #2' with status 'Waiting for ISO' and 'Delegate - Active'. Below this, the 'Closed Consultations' section shows a table with 5 items. A sample row shows 'CR-63' with status 'Closed' and '8' days since created.

This column allows primary organization contacts to see who is assigned, type and status of the contact; either Active or Inactive

Home Page Navigation



The screenshot displays the New York ISO Home Page. At the top, there is a navigation bar with the following tabs: Home, New Consultation Request, and User Management. Below the navigation bar, there are two main sections: Open Consultations and Closed Consultations.

Open Consultations
58 of 58 items

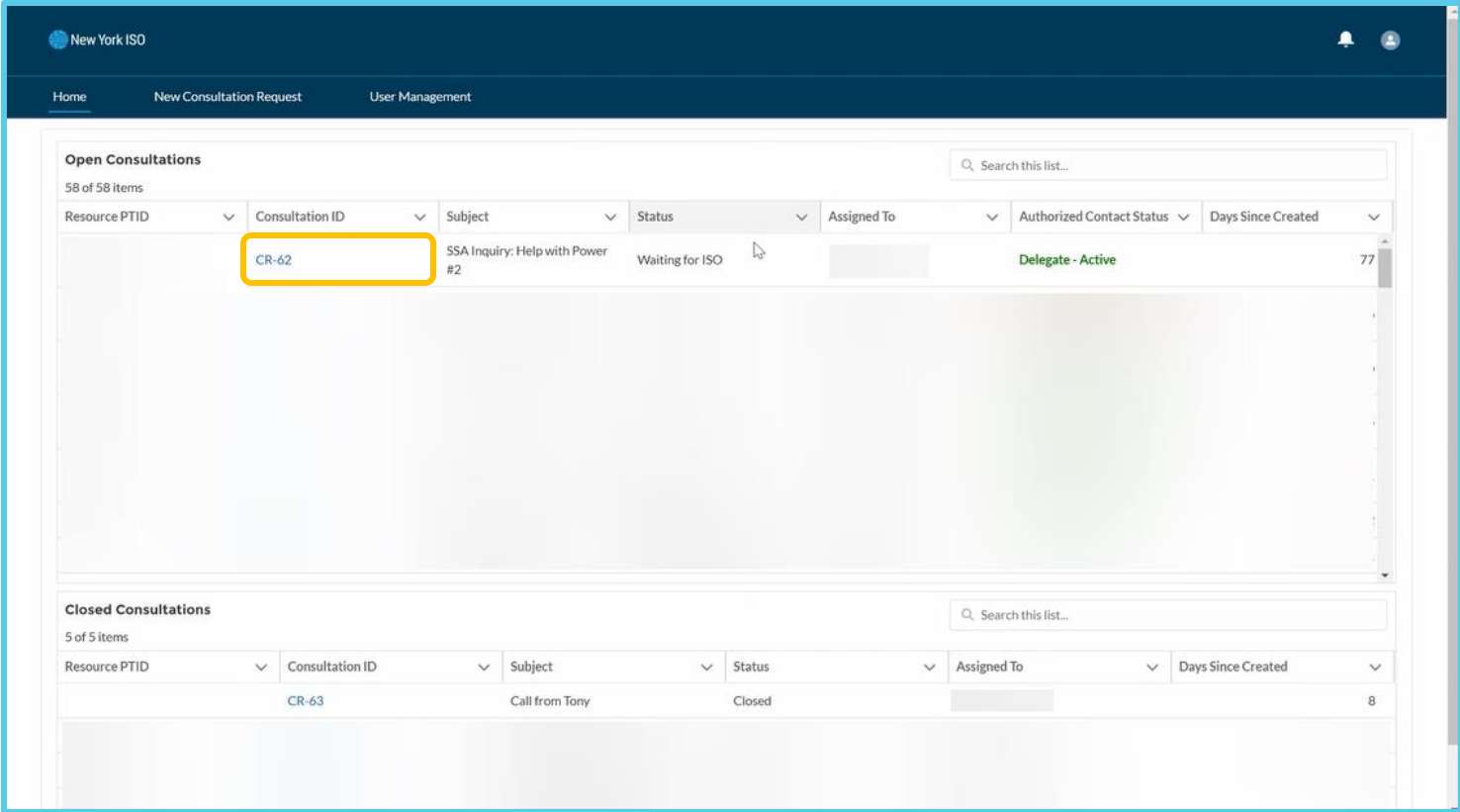
Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
		SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

Closed Consultations
5 of 5 items

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

This last column identifies the number of days since the consultation request was created.

Viewing an Open Consultation Request

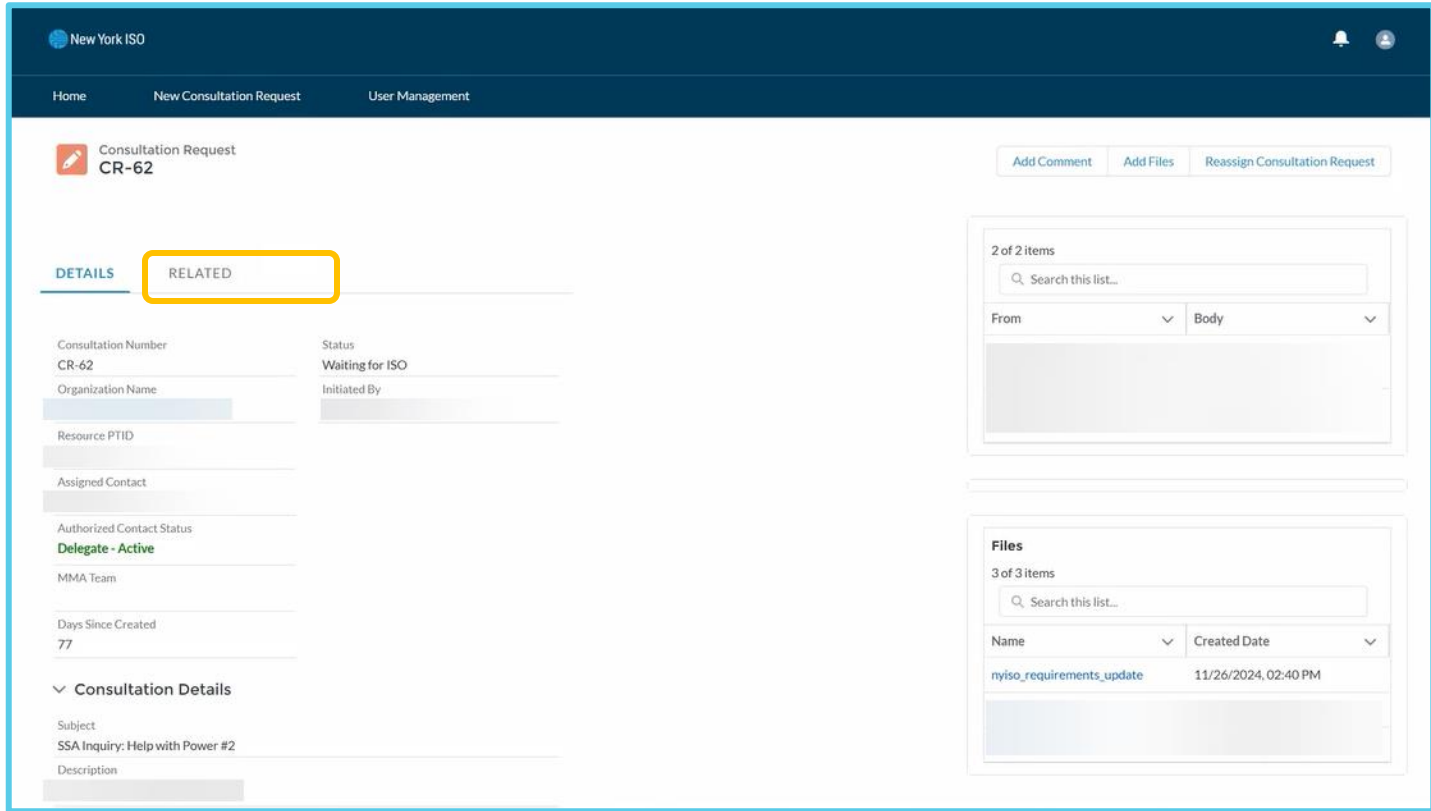


The screenshot displays the 'Open Consultations' section of the New York ISO web application. The interface includes a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. Below the navigation bar, there is a search bar and a table of consultation requests. The 'Open Consultations' table has 58 items, and the 'Closed Consultations' table has 5 items.

Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
	CR-62	SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

Viewing an Open Consultation Request



New York ISO

Home New Consultation Request User Management

Consultation Request
CR-62

Add Comment Add Files Reassign Consultation Request

2 of 2 items

Search this list...

From Body

3 of 3 items

Search this list...

Name Created Date

nyiso_requirements_update 11/26/2024, 02:40 PM

DETAILS RELATED

Consultation Number
CR-62

Organization Name

Resource PTID

Assigned Contact

Authorized Contact Status
Delegate - Active

MMA Team

Days Since Created
77

▼ Consultation Details

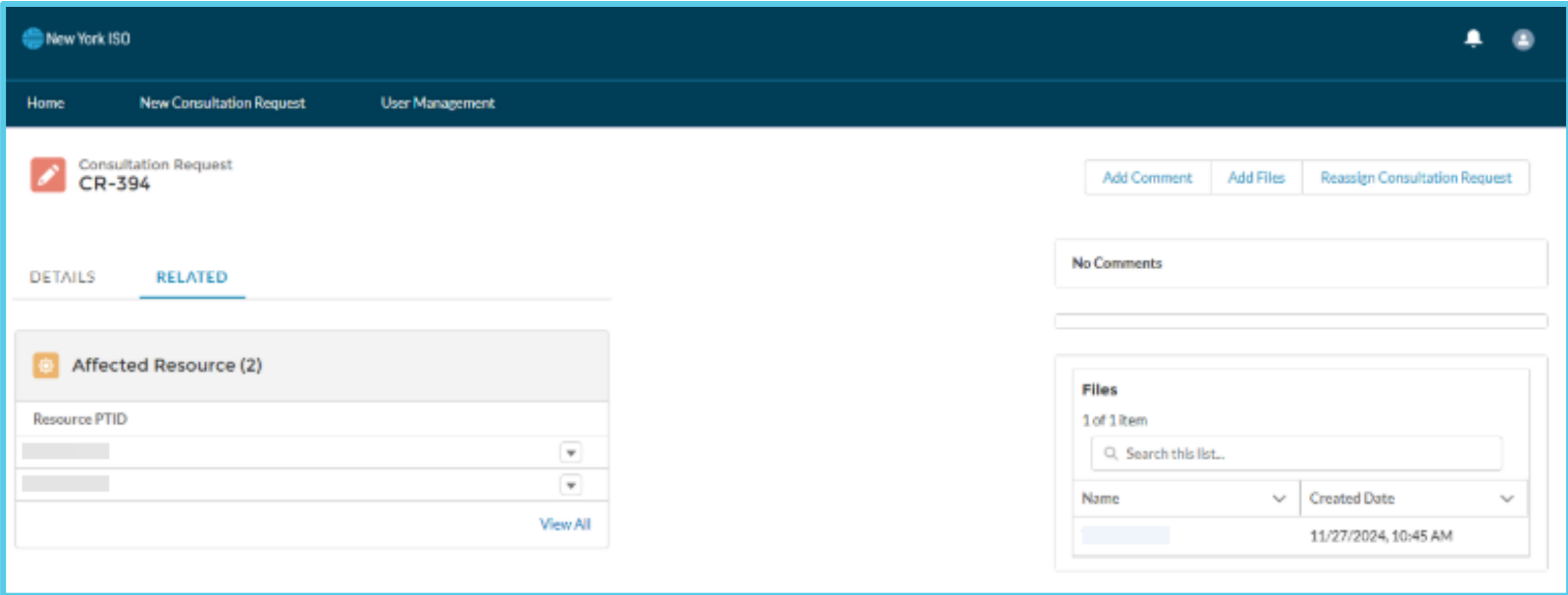
Subject
SSA Inquiry: Help with Power #2

Description

Status
Waiting for ISO

Initiated By

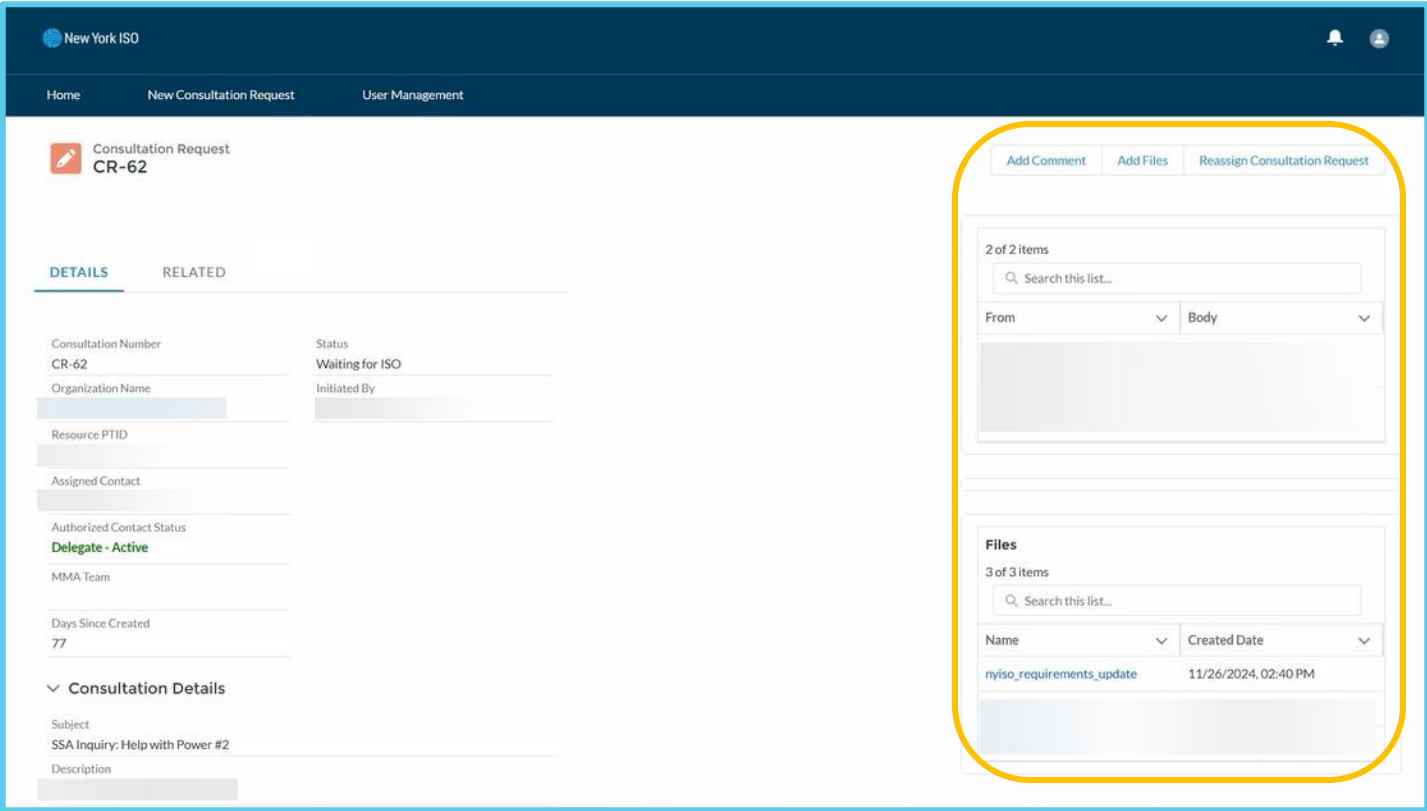
Viewing an Open Consultation Request



The screenshot shows a web application interface for viewing a consultation request. At the top, there is a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. The main content area displays 'Consultation Request CR-394' with a pencil icon. Below this, there are three buttons: 'Add Comment', 'Add Files', and 'Reassign Consultation Request'. The interface is divided into 'DETAILS' and 'RELATED' tabs. Under 'RELATED', there is a section for 'Affected Resource (2)' with two dropdown menus for 'Resource PTID' and a 'View All' link. On the right side, there is a 'No Comments' section and a 'Files' section showing '1 of 1 item' with a search bar and a table listing the file name and creation date.

Name	Created Date
[Redacted]	11/27/2024, 10:45 AM

Viewing an Open Consultation Request



Consultation Request
CR-62

DETAILS RELATED

Consultation Number: CR-62
Status: Waiting for ISO
Organization Name: [Redacted]
Resource PTID: [Redacted]
Assigned Contact: [Redacted]
Authorized Contact Status: Delegate - Active
MMA Team: [Redacted]
Days Since Created: 77

Consultation Details

Subject: SSA Inquiry: Help with Power #2
Description: [Redacted]

Add Comment Add Files Reassign Consultation Request

2 of 2 items

Search this list...

From	Body
[Redacted]	[Redacted]

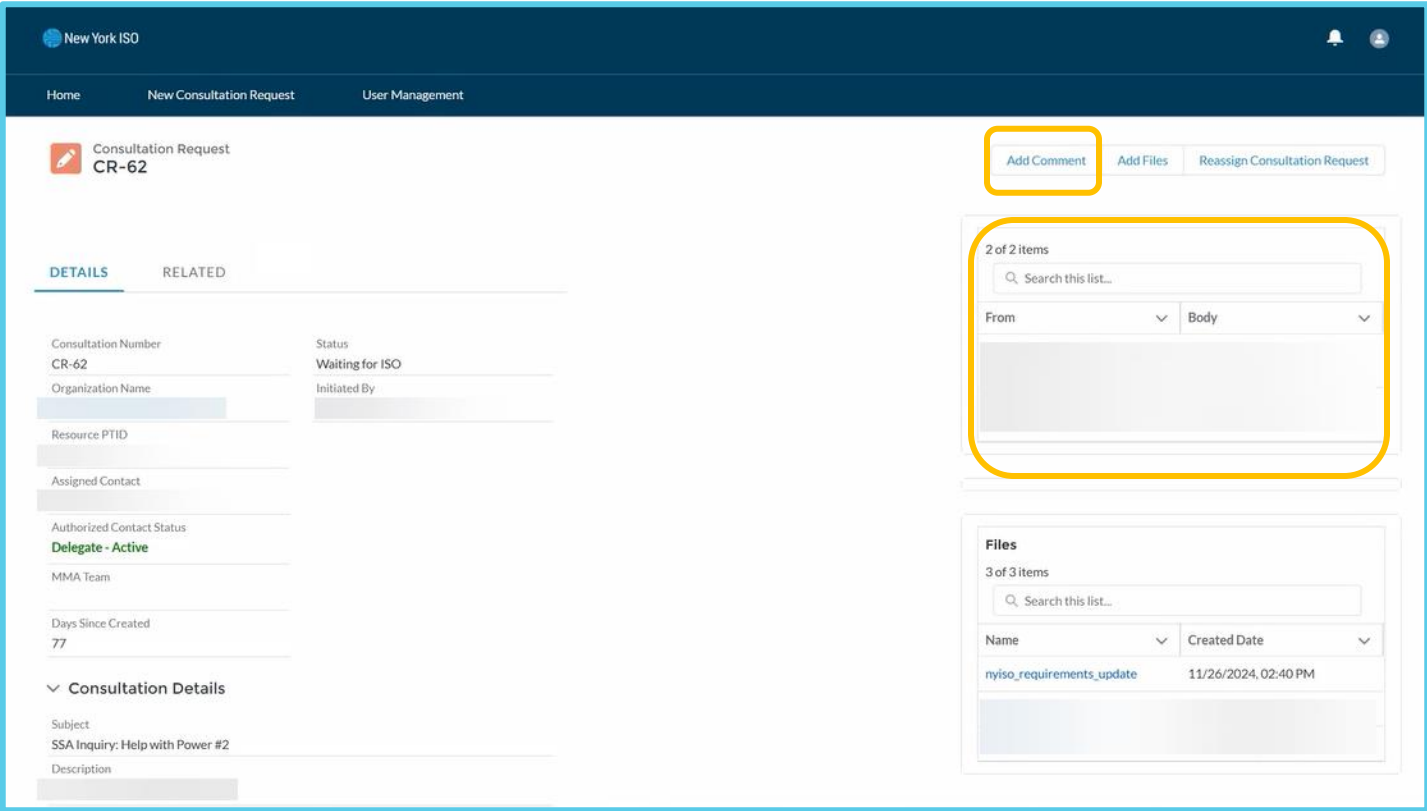
Files

3 of 3 items

Search this list...

Name	Created Date
nyiso_requirements_update	11/26/2024, 02:40 PM

Viewing an Open Consultation Request



The screenshot displays the 'Viewing an Open Consultation Request' interface. At the top, there is a navigation bar with 'Home', 'New Consultation Request', and 'User Management'. The main content area is titled 'Consultation Request CR-62' and includes three action buttons: 'Add Comment', 'Add Files', and 'Reassign Consultation Request'. Below this, there are two tabs: 'DETAILS' (selected) and 'RELATED'. The 'DETAILS' section is divided into two columns of information:

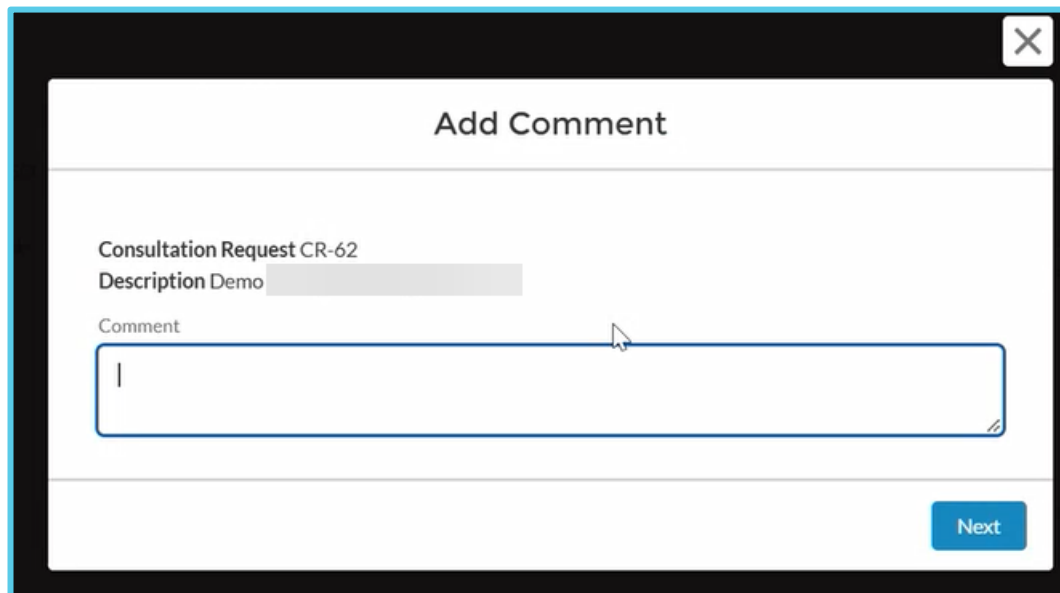
- Left Column:**
 - Consultation Number: CR-62
 - Organization Name: [Redacted]
 - Resource PTID: [Redacted]
 - Assigned Contact: [Redacted]
 - Authorized Contact Status: Delegate - Active
 - MMA Team: [Redacted]
 - Days Since Created: 77
- Right Column:**
 - Status: Waiting for ISO
 - Initiated By: [Redacted]

Below the details, there is a section for 'Consultation Details' with fields for Subject (SSA Inquiry: Help with Power #2) and Description ([Redacted]). To the right of the details, there is a 'Comments' section with a search bar and a table with 2 items. Below that is a 'Files' section with a search bar and a table with 3 items.

From	Body
[Redacted]	[Redacted]
[Redacted]	[Redacted]

Name	Created Date
nyiso_requirements_update	11/26/2024, 02:40 PM
[Redacted]	[Redacted]

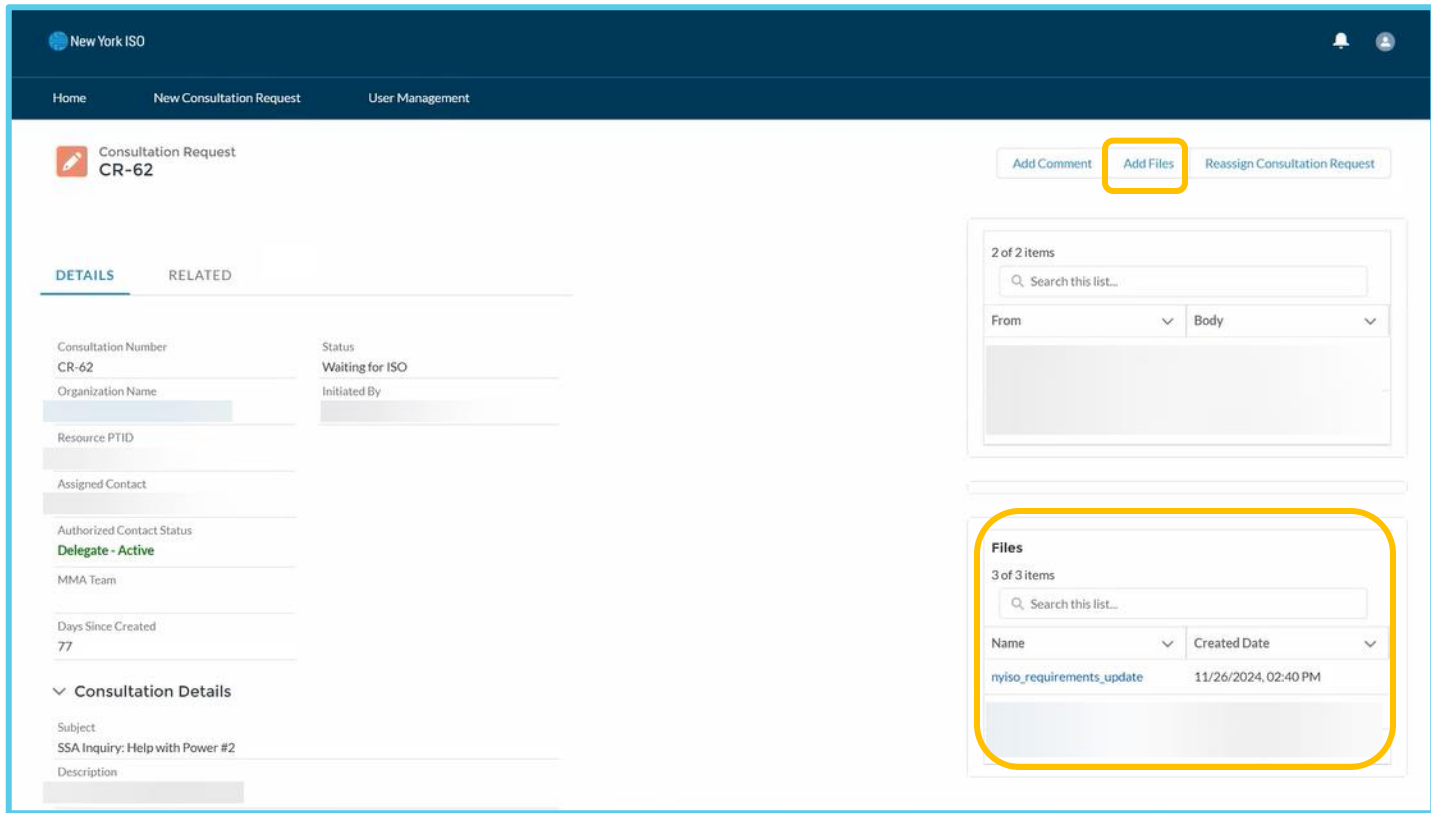
Viewing an Open Consultation Request



The screenshot shows a modal dialog box titled "Add Comment" with a close button (X) in the top right corner. The dialog contains the following text and elements:

- Consultation Request CR-62
- Description Demo [redacted]
- Comment [text input field with a cursor]
- Next button (blue)

Viewing an Open Consultation Request



New York ISO

Home New Consultation Request User Management

Consultation Request
CR-62

Add Comment Add Files Reassign Consultation Request

DETAILS RELATED

Consultation Number
CR-62

Status
Waiting for ISO

Organization Name

Initiated By

Resource PTID

Assigned Contact

Authorized Contact Status
Delegate - Active

MMA Team

Days Since Created
77

Consultation Details

Subject
SSA Inquiry: Help with Power #2

Description

2 of 2 items

Search this list...

From Body

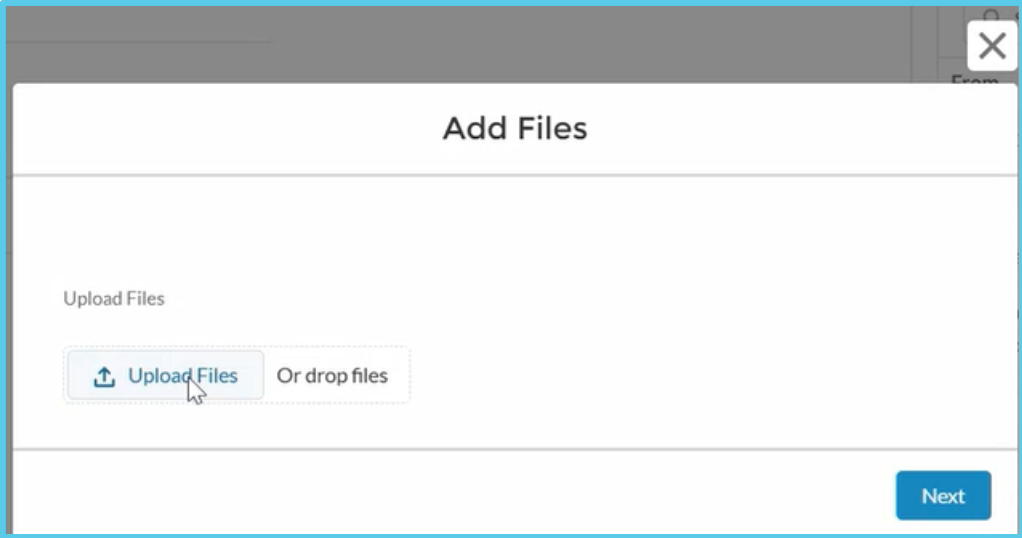
Files

3 of 3 items

Search this list...

Name	Created Date
nyiso_requirements_update	11/26/2024, 02:40 PM


Viewing an Open Consultation Request



Viewing an Open Consultation Request

New York ISO
🔔 👤

Home New Consultation Request User Management



Consultation Request

CR-62

Add Comment Add Files Reassign Consultation Request

DETAILS
RELATED

Consultation Number	Status
CR-62	Waiting for ISO
Organization Name	Initiated By
Resource PTID	
Assigned Contact	
Authorized Contact Status	Delegate - Active
MMA Team	
Days Since Created	77

▼ **Consultation Details**

Subject

SSA Inquiry: Help with Power #2

Description

2 of 2 items

From	Body

Files

3 of 3 items

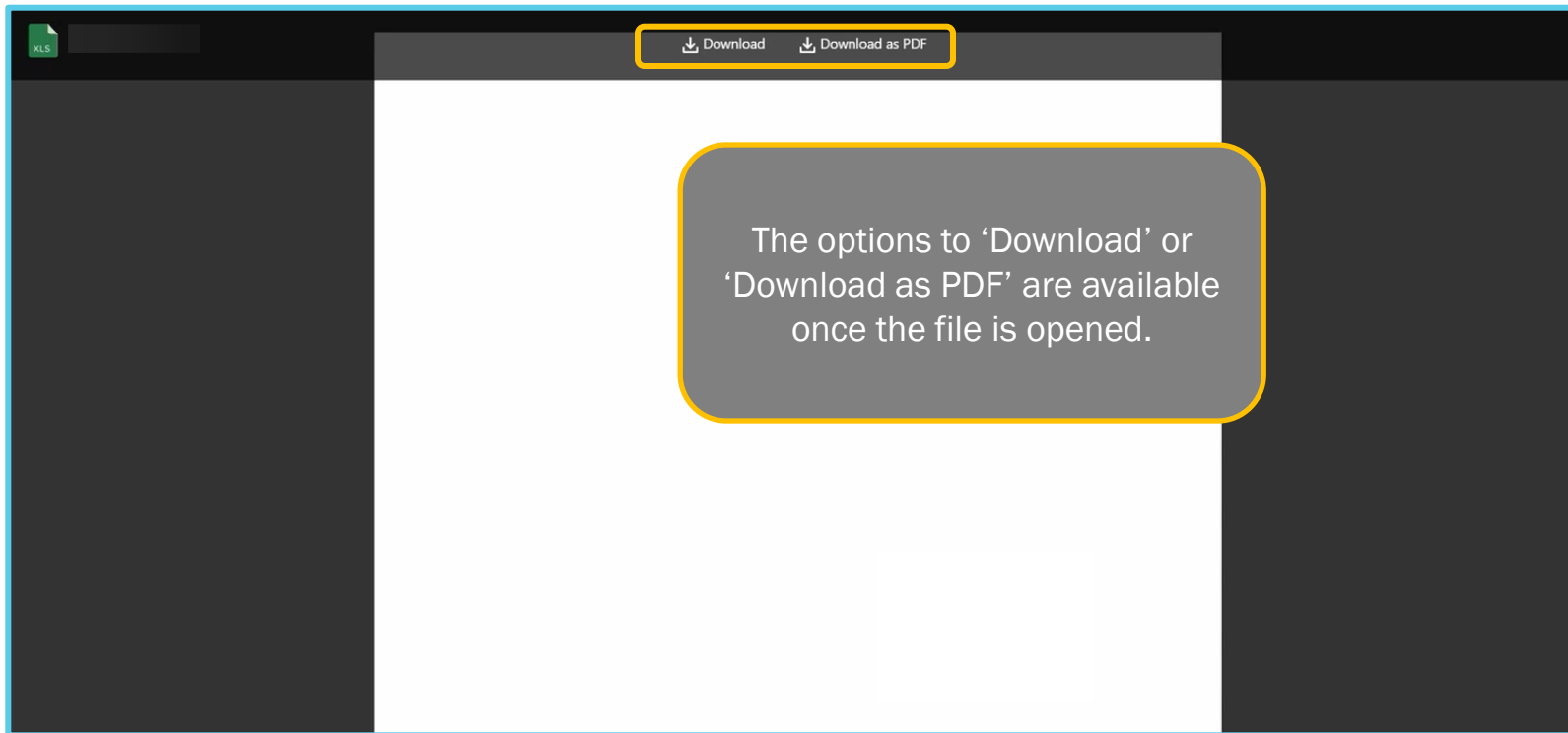
Name	Created Date
nyiso_requirements_update	11/26/2024, 02:40 PM

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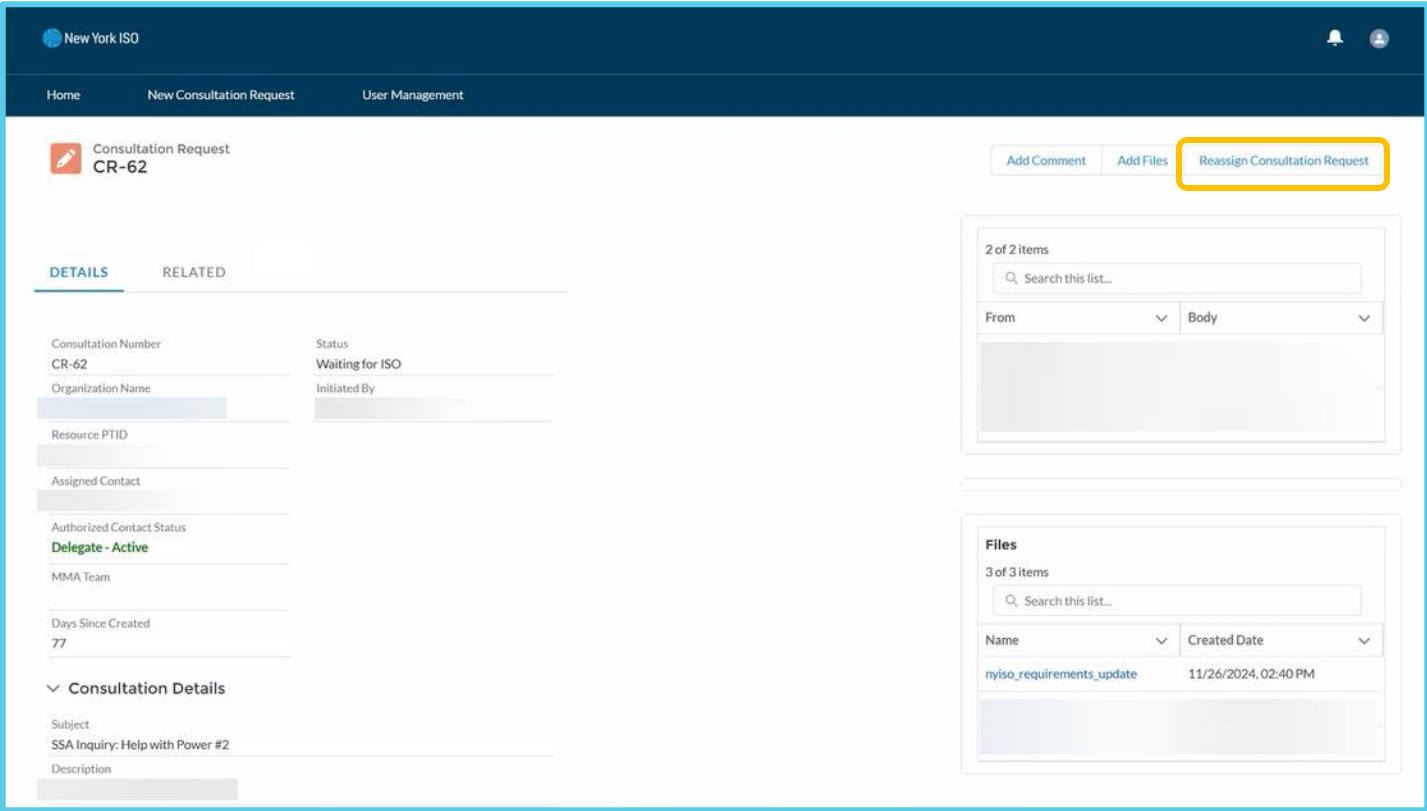
FOR TRAINING PURPOSES ONLY

29

Home Page Navigation



Viewing an Open Consultation Request



Consultation Request
CR-62

[Add Comment](#)
[Add Files](#)
[Reassign Consultation Request](#)

DETAILS | RELATED

Consultation Number	Status
CR-62	Waiting for ISO
Organization Name	Initiated By
Resource PTID	
Assigned Contact	
Authorized Contact Status	
Delegate - Active	
MMA Team	
Days Since Created	
77	

Consultation Details
 Subject
 SSA Inquiry: Help with Power #2
 Description

From	Body

Name	Created Date
nyiso_requirements_update	11/26/2024, 02:40 PM

Viewing an Open Consultation Request

✕

Reassign Consultation Request

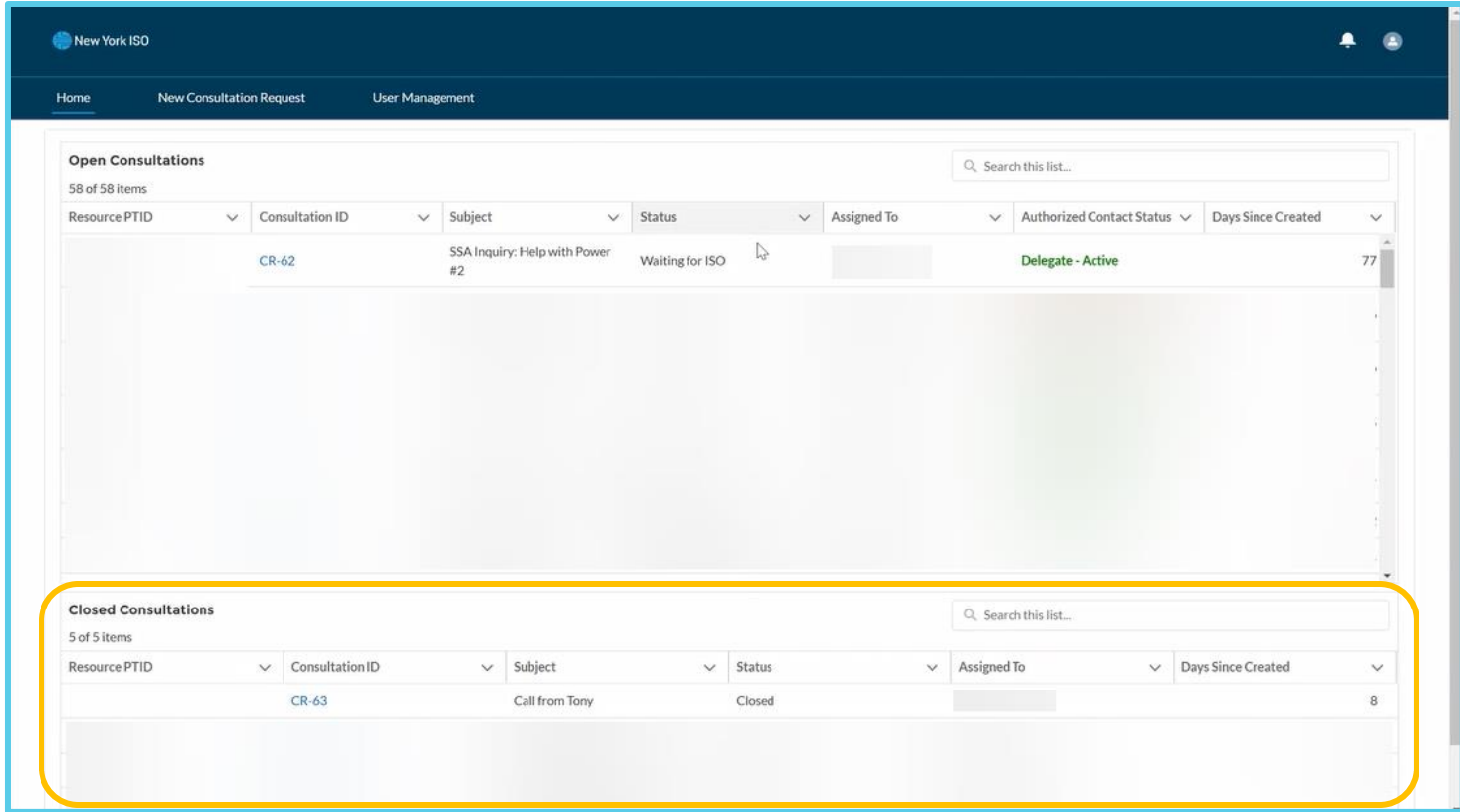
Please select a contact to reassign the Consultation Request.

5 of 5 items • 0 items selected

First Name	Last Name	Title
<input data-bbox="546 590 581 612" type="radio"/>		
<input data-bbox="546 642 581 663" type="radio"/>		
<input data-bbox="546 693 581 715" type="radio"/>		
<input data-bbox="546 744 581 766" type="radio"/>		
<input data-bbox="546 796 581 817" type="radio"/>		

Next

Home Page Navigation



The screenshot displays the New York ISO Home Page Navigation interface. The top navigation bar includes the New York ISO logo, a notification bell, and a user profile icon. Below the navigation bar, there are three main menu items: Home, New Consultation Request, and User Management. The main content area is divided into two sections: Open Consultations and Closed Consultations. Each section features a search bar and a table of consultation records.

Open Consultations
58 of 58 items

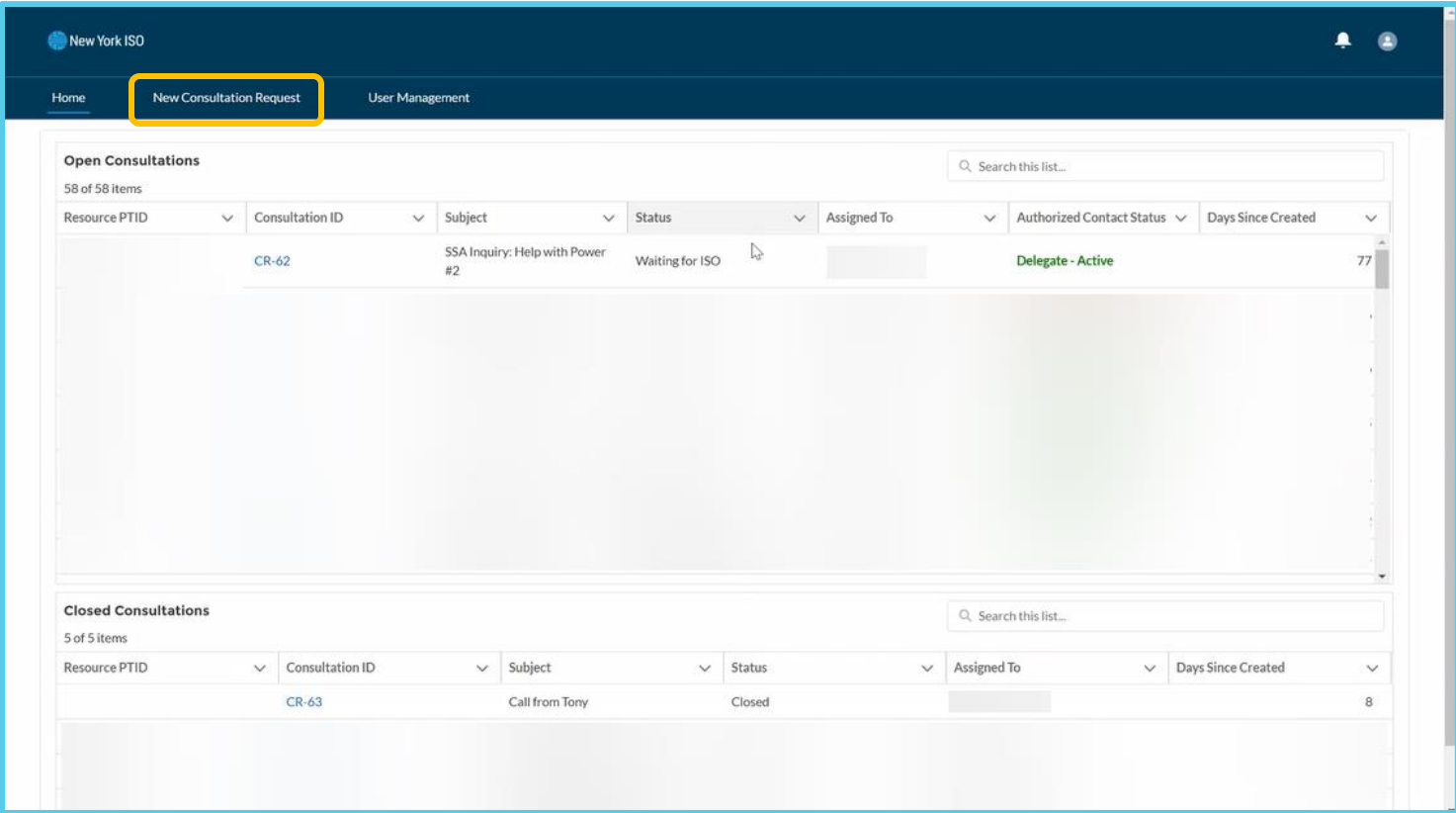
Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
	CR-62	SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

Closed Consultations
5 of 5 items

Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

Creating a New Consultation Request

New Consultation Request



New York ISO

Home **New Consultation Request** User Management

Open Consultations Search this list...

58 of 58 items

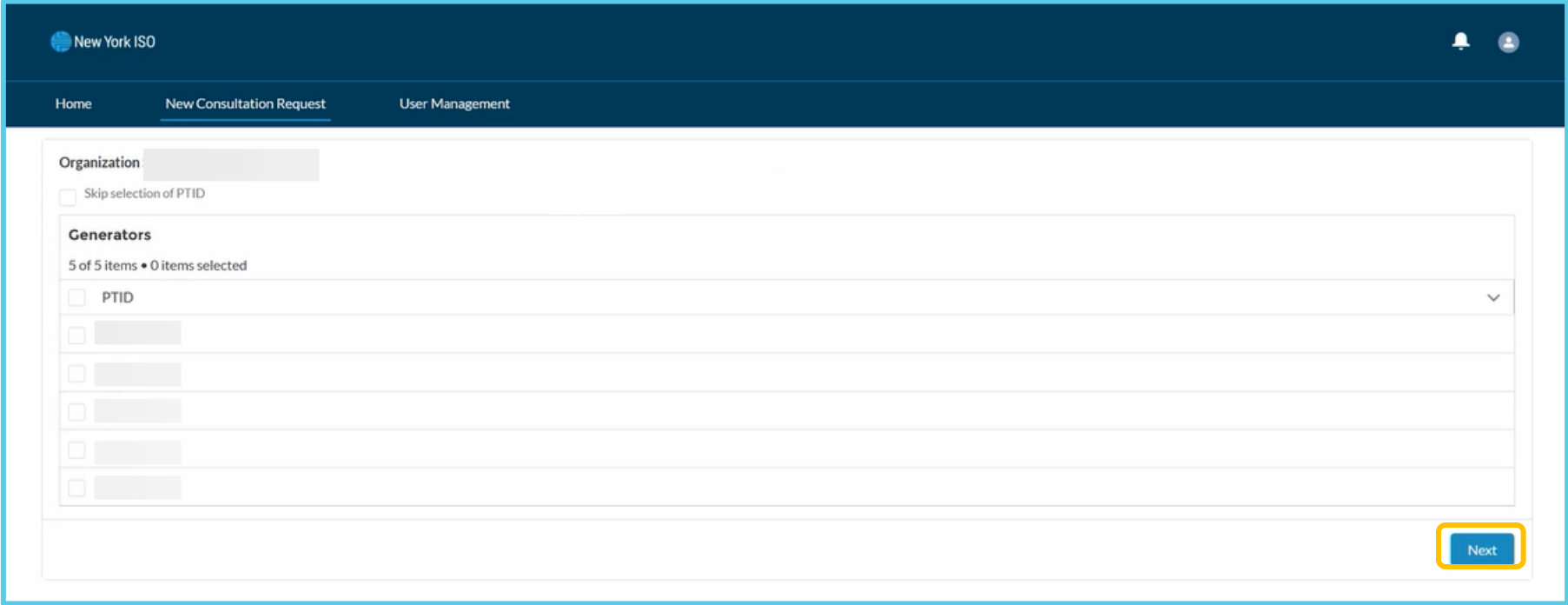
Resource PTID	Consultation ID	Subject	Status	Assigned To	Authorized Contact Status	Days Since Created
	CR-62	SSA Inquiry: Help with Power #2	Waiting for ISO		Delegate - Active	77

Closed Consultations Search this list...

5 of 5 items

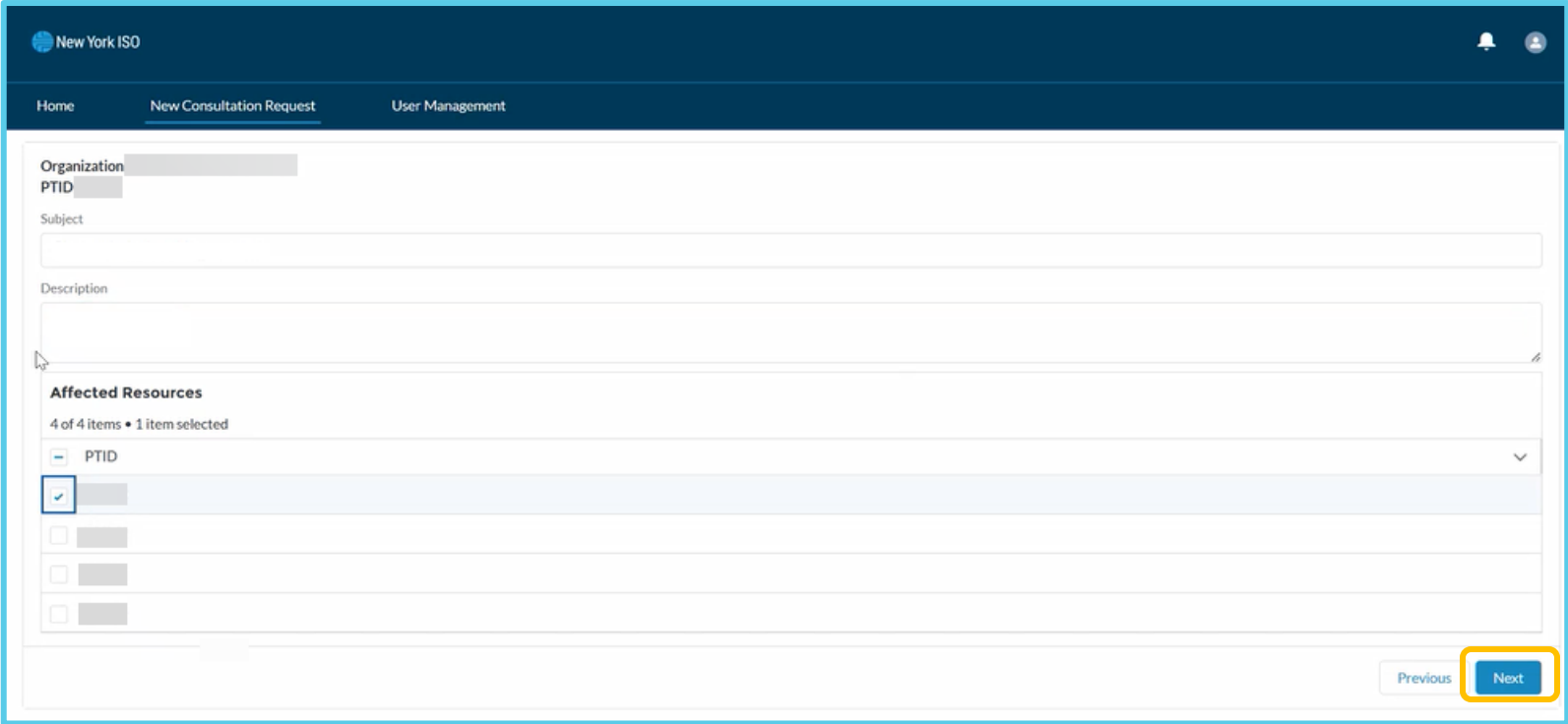
Resource PTID	Consultation ID	Subject	Status	Assigned To	Days Since Created
	CR-63	Call from Tony	Closed		8

PTID Selection



The screenshot shows a web application interface for PTID selection. At the top, there is a dark blue header with the New York ISO logo and navigation links for Home, New Consultation Request (which is underlined), and User Management. On the right side of the header, there are icons for a notification bell and a user profile. The main content area is white and contains a form. The form starts with an 'Organization' label and a greyed-out input field. Below this is a checkbox labeled 'Skip selection of PTID'. The next section is titled 'Generators' and shows '5 of 5 items • 0 items selected'. It contains a list of five generator entries, each with a checkbox and a greyed-out name. The first entry is labeled 'PTID' and has a dropdown arrow on its right. At the bottom right of the form, there is a blue 'Next' button highlighted with a yellow border.

Adding Details



New York ISO

Home New Consultation Request User Management

Organization [Redacted]
PTID [Redacted]

Subject
[Text Input Field]

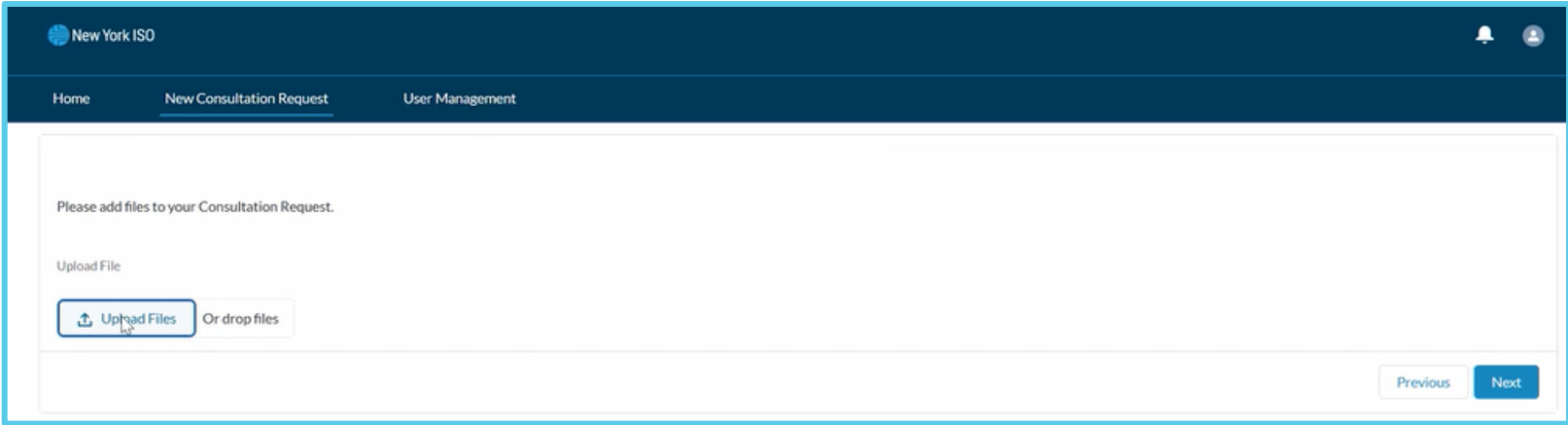
Description
[Text Input Field]

Affected Resources
4 of 4 items • 1 item selected

<input type="checkbox"/>	PTID	
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]
<input type="checkbox"/>	[Redacted]	[Redacted]

Previous **Next**

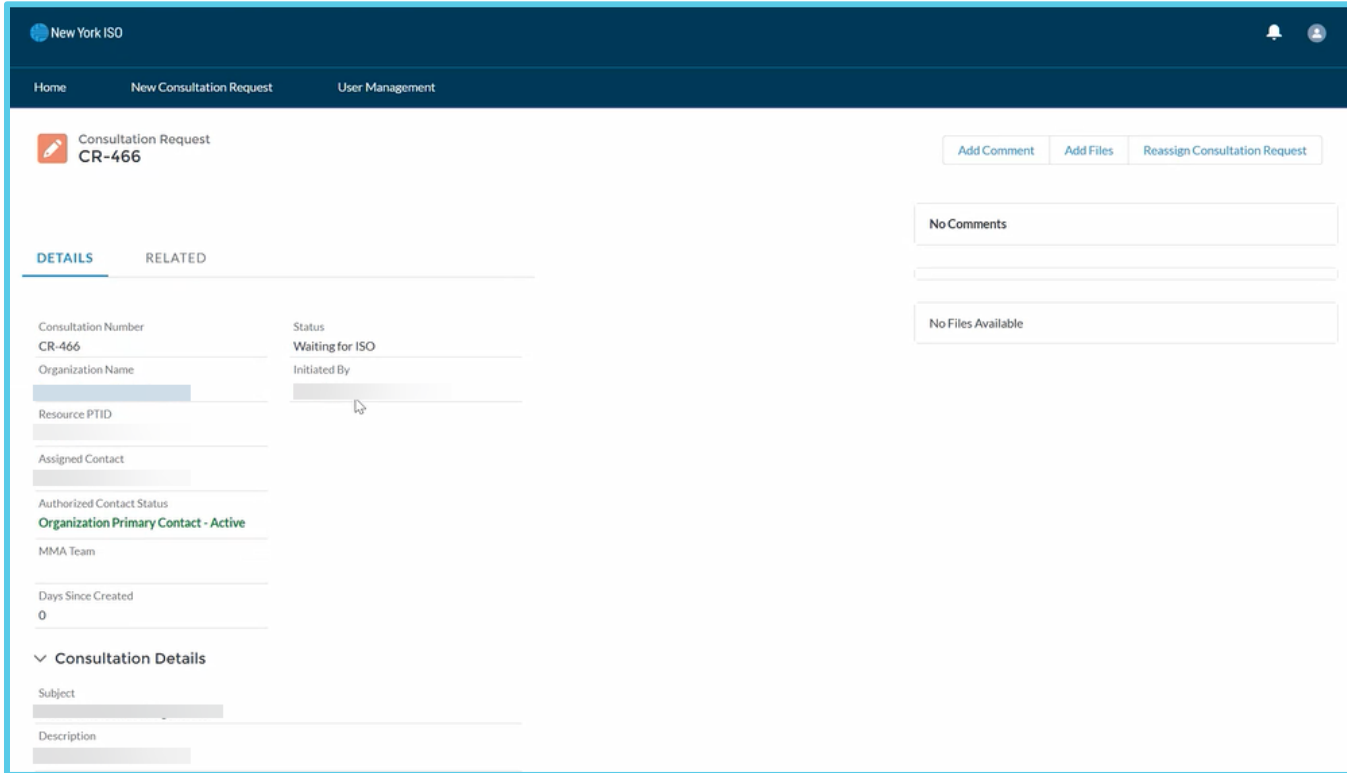
Adding Files



The screenshot shows a web application interface for the New York ISO. At the top, there is a dark blue header with the New York ISO logo and name on the left, and notification and user icons on the right. Below the header is a navigation bar with three tabs: 'Home', 'New Consultation Request' (which is active and underlined), and 'User Management'. The main content area is white and contains the following elements:

- A heading: "Please add files to your Consultation Request."
- A sub-heading: "Upload File"
- A button with an upload icon and the text "Upload Files".
- A text label: "Or drop files"
- At the bottom right, there are two buttons: "Previous" (disabled) and "Next" (active).

New Consultation Request



The screenshot displays the 'New Consultation Request' page in the New York ISO system. The page features a dark blue header with navigation links for 'Home', 'New Consultation Request', and 'User Management'. The main content area is titled 'Consultation Request CR-466' and includes action buttons for 'Add Comment', 'Add Files', and 'Reassign Consultation Request'. Below the title, there are tabs for 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing a list of fields: Consultation Number (CR-466), Organization Name, Resource PTID, Assigned Contact, Authorized Contact Status (Organization Primary Contact - Active), MMA Team, Days Since Created (0), Status (Waiting for ISO), and Initiated By. A 'Consultation Details' section is also visible, containing fields for Subject and Description. On the right side, there are two empty boxes labeled 'No Comments' and 'No Files Available'.

User Management for Primary and Secondary Contacts

Home Page Navigation



The screenshot displays the New York ISO portal's user management interface. At the top, a dark blue navigation bar contains the New York ISO logo and the text "New York ISO" on the left, and notification and user profile icons on the right. Below this, a secondary navigation bar features three menu items: "Home", "New Consultation Request", and "User Management". The "User Management" item is highlighted with a yellow border. The main content area is titled "SecCom: Portal User Management" and shows a table with one row. The table header indicates "1 of 1 item • 0 items selected". The row contains a checkbox, the text "Full Name", and a dropdown arrow. Below the table, there is a "Request Deactivation" button.

New York ISO

Home New Consultation Request **User Management**

SecCom: Portal User Management

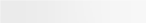
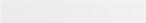

1 of 1 item • 0 items selected

Full Name

[Redacted]

Request Deactivation

Home Page Navigation

	CR-392		ISO Working		Organization Secondary Contact - Deactivation Requested	21
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Questions?

For any future assistance, please contact NYISO Stakeholder Services at stakeholder_services@nyiso.com or by phone at (518) 356-6060