

Invoicing and Banking Contact - About the Action

Each participant organization needs at least one Invoicing and Banking Contact registered with the IESO. In Online IESO, the Invoicing and Banking Contact has the responsibility to submit and maintain your organization's banking information.

Logging In

- Go to <https://online.ieso.ca>
- Enter your IESO user account name and password (the same used for the IESO Portal).
- Note: If you have not already done so, log in at <https://portal.ieso.ca> to set up your secret questions and answers so that you can reset your password yourself.

The first page you see in Online-IESO is the **News** page with updates of recent activities in the system.

The **Actions** page allows you to begin a request, while Tasks will show if you have any pending assignments to complete.

Invoicing and Banking Contact Responsibilities

- Submit banking information for your organization when requesting authorization into an IESO market or program that requires the submission of banking information.
- Maintain your organization's banking information by reviewing and updating the information when required.
- Approve the submission or updates to banking information when submitted by another Invoicing and Banking Contact at your organization.

Fulfilling the Role

Review and, if necessary, change your own contact information.

- On the **Actions** page, select "Manage My Information".

Review the business contact information shown and make any necessary changes.

Be sure to keep your telephone number and email up to date.

Submit Banking Information

The Invoicing and Banking Contact will be required to submit banking information for their organization

when the organization is requesting participation in an IESO market or program that requires banking information.

As the Invoicing and Banking Contact you will receive tasks which will appear on the **Tasks** page to submit banking information for a 'Manage Participation' request.

You will receive an email notification when a task has been assigned to you.

Maintain Banking Information

The Invoicing and Banking Contact should review the registered banking information for their organiza-

tion using the **Records** page and make any necessary updates.

- On the **Actions** page, select “Update Organization”. If necessary, indicate the organization you want to update banking information for. Click “Next” and choose the action “Update Banking Information” to continue. Review the registered banking information and make the required updates.

Approve Banking Information Submitted by another Invoicing and Banking Contact

When another Invoicing and Banking Contact at your organization submits or makes updates to banking information you will receive a task to approve the submission.

This task is assigned to all Authorized Representatives, Invoicing and Banking Contacts, and Primary Contacts. Anyone, except the requestor, who receives the Task to approve the banking information change can accept and either approve or reject the change.

Additional information about IESO Online is available **Online IESO**

For more information, contact IESO Customer Relations:

Tel: 1.888.448.7777

Email: customer.relations@ieso.ca