

Applicant Representative –About the Role

Each participant needs at least one Applicant Representative – and preferably more – registered with the IESO. The Applicant Representative is responsible for tasks related to participation in a market or program, including keeping registered contacts up to date.

An Applicant Representative is role created by an organization’s Rights Administrator, a role that initiates and takes a lead in an organization’s request to join an IESO-administered market or program

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.

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.

Add or remove a Contact

The Applicant Representative can add or remove a contact role from a person. Note that access to IESO information systems is granted separately, by the Rights Administrator.

- On the Actions page, select “Update Organization”. If necessary, indicate the organization you want to add a contact for. Click “Next” and choose the action “Update Contact(s)” to continue.

Applicant Representative Responsibilities:

1. Maintain your organization’s registered contacts and Business relationships (i.e. assign MSP for resources).
2. Coordinate with your organization’s Rights Administrators as needed, to ensure registered contacts have necessary access to IESO systems.
3. As required, update information related to your organization’s participation in IESO-administered markets or programs, such as main address, license or Emergency Preparedness Plan.
4. Receive certain notices and complete any tasks assigned by the IESO. When there is more than one Applicant Representative at an organization, you will all receive notices that are issued to your group and will be able to act as a team.
5. Keep your own contact information up to date.

Avoid registration delays by first searching to see if a person is registered. This prevents duplicate registrations. Use the Person ID number to verify that a registered person is the correct contact for your organization.

There are three options for updating contacts.

By Person – This allows you to add or remove contact roles from a person. You can register a new person with the IESO, or choose an existing person. When a new person is registered, he or she will automatically

receive a user name and password to access the Registration System. This normally takes up to five business days to complete.

By Role – This allows you to choose a single contact role type and add or remove one or more persons from the role. You can register a new person if necessary.

By Section – A Section is a single point of contact that may represent a group of people at your organization. You can create these here for certain contact roles. For example, a group email with the Section name “Settlements Group” could be given the Settlements contact role.

Some contact roles have a minimum or maximum number of persons that can be assigned to the role. The Registration System will not allow you to go outside those predetermined limits. If a change will go outside these limits, it is necessary to add or remove a person at the same time. Using the “By Role” function is a good way to manage changes that impact required minimum and maximum roles.

Certain contacts types are mandatory, which is shown when there is a required minimum. Contacts without a required minimum are recommended.

The Applicant Representative cannot update all contact roles. For example, the Rights Administrator role can only be updated by the Primary Contact. If you do not have access and you are removing roles from a person, the confirmation page will advise of other contact roles that may need to be changed

Register an Applicant Representative

Prudential Requirements and Reliability Compliance contacts require specific system access to work with the IESO. This system access must be assigned by the Rights Administrator.

If the Applicant Representative registers a contact in

one of these roles, you will be notified and will need to grant the necessary system access using the Manage System Access Action

Manage Registered Sections

If you have Sections already registered as contacts with the IESO, you can make changes to contact roles and contact information using the Update Organization Action and selecting Update Section(s).

- To create a new section, choose Update Contact(s) and click the “By Section” button to continue.

Update organization’s main contact information

- The main address and telephone number registered with the IESO can be changed by using the Update Organization Action. Choose Update Organization Information to continue.

The HST number for an organization can also be updated using Update Organization Information. “By Role” (choose Applicant Representative).

Assign business relationships (resource MSP)

- To assign resource a MSP to a resource, accept the task and select the MSP organization.

You will receive the task as part of ‘Manage Resource’ or ‘Manage Facilities and Equipment’ once the MMP or MMPT are confirmed. Notifications will be sent out when tasks are assigned.

An organization may assign a relationship role for their resource (Operator, MMP, RMP, MSP) to your organization. You will be responsible for accepting this relationship role.

Submit a renewed OEB Licence or NEB Permit

- To upload a new licence or permit document, use

the Update Organization Action. Choose Submit Licence to continue.

A notification is sent when the new licence has been reviewed and approved by the IESO. If it is rejected, a notification with an explanation and further instructions is sent.

Submit a new Emergency Preparedness Plan

It may be necessary to coordinate with Emergency Preparedness Plan contact(s) at your organization.

- When it is necessary to submit a new Emergency Preparedness Plan, use the Update Organization Action. Choose Submit Emergency Preparedness Plan to continue.

A notification is sent when the Emergency Preparedness Plan has been reviewed and approved by the IESO. If it is rejected, a notification with an explanation and further instructions is sent.

Did you know?

- If the Applicant Representatives at your organization need to be changed, the Rights Administrator can do this using the Update Organization Action (by choosing Update Contacts).
- You can have multiple registration roles. For example, you may also be a Rights Administrator and an Applicant Representative.
- If you require access to additional IESO information systems for other activities, this can only be granted by a Rights Administrator for your organization.

Information about Online IESO is available at the **Online IESO Homepage**

For more information, contact IESO Customer Relations:

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