

Primary Contact –About the Role

Each participant organization needs at least one Primary Contact – and preferably more – registered with the IESO. In the Registration system, the Primary Contact has responsibility to serve as the IESO’s day-to-day contact and for assigning Rights Administrators and other Primary Contacts.

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.

Primary Contact Responsibilities:

- Serve as the day-to-day contact for the IESO.
- Add or remove another Primary Contact.
- Register Rights Administrators, who can grant or revoke access to IESO information systems on behalf of your organization.
- Be notified of changes to your organization’s banking information made by an Invoicing and Banking contact. The Primary Contact can choose to review and approve the Banking Information change when this Task is received.
- Receive certain notices and complete tasks assigned by the IESO. When there is more than one Primary Contact at an organization, you will all receive notices that are issued to your group and will be able to act as a team.

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.

Register a Primary Contact

A Primary Contact is the person who receives day-to-day communications from the IESO on a range of topics. The Primary Contact is also responsible for reg-

istering Rights Administrators for your organization, who can grant or revoke access to IESO Information Systems.

- 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. You can update this contact “By Person” or “By Role” (choose Primary Contact).

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

Remove a Primary Contact

You must have at least one Primary Contact registered at all times. If you are the only Primary Contact and wish to be replaced, you can only be removed if a second Primary Contact is registered first (the Authorized Representative can also do this).

- 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. You can update this contact “By Person” or “By Role” (choose Primary Contact).

Register a Rights Administrator

The Rights Administrator can grant or revoke access to IESO information systems. Only the Primary Contact can add or remove persons in this role.

- 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. You can update this contact “By Person” or “By Role” (choose Rights Administrator).

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

Receive a Task to approve banking information changes for your organization

When your organization’s banking information is changed by a registered Invoicing and Banking Contact, a notification will be sent as a Task to approve the change.

This task goes to all registered Authorized Representatives, Invoicing and Banking Contacts, and Primary Contacts. Anyone who receives the Task to approve

the banking information change can accept and either approve or reject the change.

Did you know?

You can have multiple registration roles. For example, you may also be the Primary Contact for day-to-day communication with the IESO. See Registration System Roles and Responsibilities for more.

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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