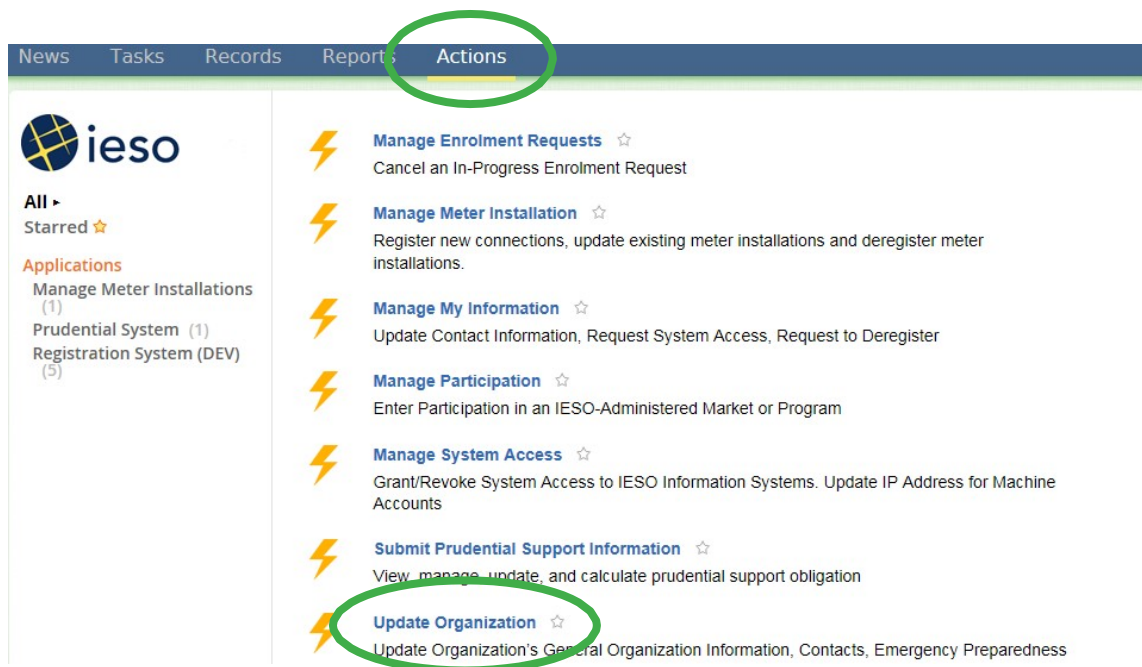
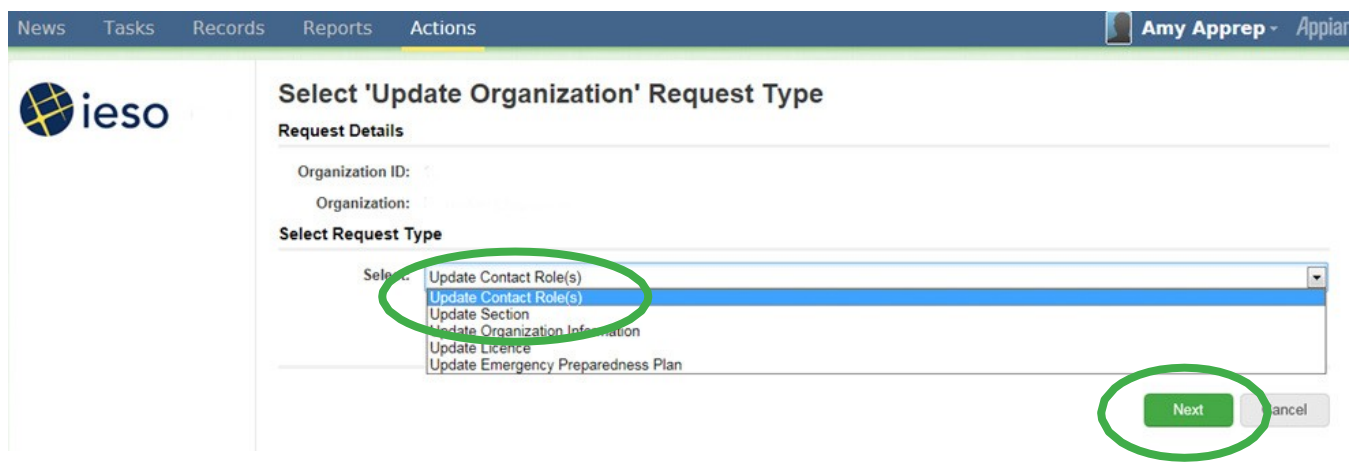


Adding a Contact Role: Step-By-Step

1. Under 'Actions', choose, 'Update Organization'.



2. Select the organization you are adding a contact for, or if there is only one, your organization is automatically selected.
Select 'Update Contact Role(s)' and choose 'Next'.



3. Choose to search 'By Person'.

The screenshot shows the IESO web application interface. At the top, there is a navigation bar with tabs: News, Tasks, Records, Reports, and Actions. The user's name, Amy Apprep, is displayed in the top right corner. The main content area is titled 'Select an Update Type'. Under 'Request Details', the 'Request Type' is set to 'Update Contact Role(s)'. A 'Need Help?' link is provided. At the bottom right, there are three buttons: 'By Person', 'By Role', and 'By Section'. The 'By Person' button is highlighted with a green circle.

4. Enter the person's name and choose 'Search for Person'.

The screenshot shows the IESO web application interface for searching for a registered person. The navigation bar includes 'News', 'Tasks (13)', 'Records', 'Reports', and 'Actions'. The user's name, Bill Msp, is displayed in the top right corner. The main content area is titled 'Search for a Registered Person'. Under 'Request Details', the 'Request Type' is set to 'Update Contact Role(s) by Person'. A 'Need Help?' link is provided. Below the request details, there are three input fields: 'Person ID', 'Last Name', and 'First Name'. A 'Search for Person' button is located at the bottom right, highlighted with a green circle.

5. If the person is not registered, choose 'Register New Person'. Otherwise, go to step 8.

News Tasks (13) Records Reports Actions Bill Msp - Appia

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Select Registered Person

Request Details

Organization ID:

Organization:

Request Type: Update Contact Role(s) by Person

Search Results

Person ID	Last Name	First Name	Preferred Name	Middle Name
No items available				

If you do not see the correct person, please refine your search in the fields below or click 'Register New Person'.

Person ID:

Last Name:

First Name:

[Need Help?](http://www.ieso.ca/registration.help/#1.32)
http://www.ieso.ca/registration.help/#1.32

Next Refine Search **Register New Person** Cancel

6. Enter the Person Information and choose 'Next'.

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Register a New Person

Request Details

Organization ID:

Organization:

Request Type: Update Contact Role(s) by Person

Please fill in the mandatory information below. The address fields have been populated with the organization's registered address but can be modified. Please note an email will be sent to this person upon registration.

Person Information

* First Name: * Address Line 1:

* Last Name: Address Line 2:

* Main Phone: Address Line 3:

Example: 123-456-7890 Address Line 4:

Main Phone Extension: * City:

Numbers only * Province/State:

* Main Email: * Postal Code/Zip Code:

Example: R3T 2T5 or 12345. If unknown, use N/A * Country:

[Need Help?](http://www.ieso.ca/registration.help/#1.3)
http://www.ieso.ca/registration.help/#1.3

Next

7. Review your new person details and choose 'Confirm'.

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Confirm New Person Registration

Click "Confirm" to register the person, an email will then be sent to the person. Ensure you have entered the information correctly as it may be used to send confidential information.

Request Details

Organization ID:
Organization:
Request Type: Update Contact Role(s) by Person

Person Information

First Name	Jane	Address Line 1	123 fake street
Last Name	Dow	Address Line 2	
Main Phone	123-456-7890	Address Line 3	
Main Email	jane@dow.com	Address Line 4	
		City	Ogdenville
		Province/State	Ontario
		Postal Code/Zip Code	H0H 0H0
		Country	Canada

[Need Help?](http://www.ieso.ca/registration.help/#1.9)

Confirm **Cancel**

8. Select the person you wish to register in a new role and choose 'Next'.

News Tasks (13) Records Reports **Actions** Bill Msp Appian

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Select Registered Person

Request Details

Organization ID:
Organization:
Request Type: Update Contact Role(s) by Person

Search Results

Person ID	Last Name	First Name	Preferred Name	Middle Name
<input checked="" type="checkbox"/> 507435	Doe	Jane		

If you do not see the correct person, please refine your search in the fields below or click "Register New Person".

Person ID
Last Name Doe
First Name Jane

[Need Help?](http://www.ieso.ca/registration.help/#1.32)

Next **Refine Search** **Register New Person** **Cancel**

9. Choose the required contact role and choose 'Add Contact'.

News Tasks (13) Records Reports **Actions** Bill Msp - Apple

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Update Contact Role(s)

Request Details

Organization ID: _____
 Organization: _____
 Request Type: Update Contact Role(s) by Person
 Person Name: Jane Doe

Available/Removed Contact Role(s)

Click 'Add Contact Role(s)' to add selected contact role(s).

<input type="checkbox"/>	Contact Role Name	Description	Min. Required	No. Of Existing	Max. Permitted	Status
<input type="checkbox"/>	Information Technology	Person or Section responsible for communicating with the IESO about information technology services, projects and changes for your organization.	0	0	-	
<input type="checkbox"/>	MSP Revenue Metering	Person or Section responsible for metering data for your organization. This includes reviewing metering data and requesting data downloads.	1	2	-	
<input type="checkbox"/>	Revenue Metering Data	Person responsible for retrieving revenue meter data reports for your organization.	1	0	-	

Existing/Added Contact Role(s)

Click 'Remove Contact Role(s)' to remove selected contact role(s). To remove all contact role(s), select the top left check box and then click 'Remove Contact Role(s)'.

<input type="checkbox"/>	Contact Role Name	Description	Min. Required	No. Of Existing	Max. Permitted	Status
<input type="checkbox"/>	Meter Trouble Report	Person or Section responsible for monitoring metering data and the response of the Meter Service Provider, and responding to the late notification of Meter Trouble Reports for your organization.	1	1	1	Existing

[Need Help?](#)
<http://www.ieso.ca/registration.help/#1.25>

Done Cancel **Add Contact Role(s)** Remove Contact Role(s)

10. Choose 'Done'.

News Tasks (13) Records Reports **Actions** Bill Msp - Apple

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Update Contact Role(s)

Request Details

Organization ID: _____
 Organization: _____
 Request Type: Update Contact Role(s) by Person
 Person Name: Jane Doe

Available/Removed Contact Role(s)

Click 'Add Contact Role(s)' to add selected contact role(s).

<input type="checkbox"/>	Contact Role Name	Description	Min. Required	No. Of Existing	Max. Permitted	Status
<input type="checkbox"/>	MSP Revenue Metering	Person or Section responsible for metering data for your organization. This includes reviewing metering data and requesting data downloads.	1	2	-	
<input type="checkbox"/>	Revenue Metering Data	Person responsible for retrieving revenue meter data reports for your organization.	1	0	-	

Existing/Added Contact Role(s)

Click 'Remove Contact Role(s)' to remove selected contact role(s). To remove all contact role(s), select the top left check box and then click 'Remove Contact Role(s)'.


<input type="checkbox"/>	Contact Role Name	Description	Min. Required	No. Of Existing	Max. Permitted	Status
<input type="checkbox"/>	Information Technology	Person or Section responsible for communicating with the IESO about information technology services, projects and changes for your organization.	0	1	-	
<input type="checkbox"/>	Meter Trouble Report	Person or Section responsible for monitoring metering data and the response of the Meter Service Provider, and responding to the late notification of Meter Trouble Reports for your organization.	1	1	1	Existing

[Need Help?](#)
<http://www.ieso.ca/registration.help/#1.25>

Done Cancel Add Contact Role(s) Remove Contact Role(s)

11. Choose 'Confirm'

News Tasks (14) Records Reports Actions Bill Map - Applan

 Save Changes

Confirm Contact Role(s)

Request Details

Organization ID:
Organization:
Request Type: Update Contact Role(s) by Person
Person Name: Jane Doe

Contact Role(s) to be Added

Contact Role Name	Description	Min. Required	No. of Existing	Max. Permitted	Status
Information Technology	Person or Section responsible for communicating with the IESO about information technology services, projects and changes for your organization.	0	1	-	

Contact Role(s) Summary

This is the list of contact role(s) the person/section will have after you click 'Confirm'.

Contact Role Name	Description	Min. Required	No. of Existing	Max. Permitted	Status
Information Technology	Person or Section responsible for communicating with the IESO about information technology services, projects and changes for your organization.	0	1	-	
Meter Trouble Report	Person or Section responsible for monitoring metering data and the response of the Meter Service Provider, and responding to the late notification of Meter Trouble Reports for your organization.	1	1	1	Existing

Go Back **Confirm** Cancel

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

For more information, contact IESO Customer Relations:

Tel: 1.888.448.7777

Email: customer.relations@ieso.ca