

Joining a Market or Program

The IESO administers a physical market, with various participation types, a financial market (transmission rights) and a number of special-purpose programs. In order to participate in a market or program you must register through Online IESO.

Logging In

Go to **<https://online.ieso.ca>** and enter your IESO user account name and password (the same used for the IESO Portal). 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.

Roles involved in the joining a market or program process

An **Applicant Representative** begins the application process to participate in a new market or program.

A **Rights Administrator** will be prompted to grant system access as required.

An **Invoicing and Banking contact**, provides the organization's banking details. The banking details will be sent to all other registered Invoicing and Banking contacts as well as the **Primary Contacts** and **Authorized Representatives** for the organization. One of these contacts must review and approve the submitted banking information.

Choose a Market or Program

Only one Market or Program registration can be in progress at any given time. **Take the following steps to choose a market or program:**

1. On the Actions page, select "Manage Participation". If necessary, indicate the organization you want to act on behalf of for this activity.
2. Click "Next" and then select the market or program name from the drop down menu.

This will result in a "to do" list of activities on the Task page. Some tasks are dependent upon the completion of other tasks, and will appear only when those tasks are finished. Other tasks can be completed simultaneously. If there are other Applicant Representatives registered for the organization, the same tasks will appear on each Applicant Representatives' Task page to allow for team collaboration.

Complete Assigned Tasks

Tasks will vary, depending on the type of market or program participation selected. All necessary activities will be shown on the Tasks page, with notifications of new tasks provided via email.

Submit IESO Market Entry Application Fee Payment

This is a one-time fee. Organizations new to the IESO who have selected market participation will not be able to continue with the application process until the fee is paid by credit card or wire transfer. Online IESO provides information on how to complete the payment.

Once payment is submitted, use the Registration System to notify the IESO. The. Following payment verification and confirmation by the IESO, new tasks will be assigned to the Applicant Representative.

Assign Contact Roles

Mandatory contact roles will be shown in this task. Search the IESO database for the names of person(s) (or section(s) to add to each role. Existing contacts will also be shown for previously registered organizations. If a name is found in the database, verify the person ID number to ensure a match with the individual in the organization.

New contacts may be added. Newly registered persons are notified immediately via email of the registration. New contacts are then provided with a user name and password (normally within five business days).

The organization may be subject to reliability standards obligations. An assessment will be completed by the IESO to determine whether this is applicable. If necessary, the Applicant Representative will be required to assign a Market Participation Compliance Contact and a Market Participant Escalation Contact.

Optional contact roles related to the participation may also be shown and can be assigned at a later date through actions to Update Organization or Update Contact Role.

Submit Licence

The applicant representative will be required to submit an Ontario Energy Board Licence (and in some cases, a National Energy Board Permit) for certain types of participations.

Submit and Approve Banking Information

If the organization is new to the IESO, the Invoicing and Banking Contact will be required to provide banking information for certain types of participation. The banking information must be reviewed and approved by another Invoicing and Banking Contact, a Primary Contact or an Authorized Representative.

Submit Prudential Information

For participation in the physical market, the Applicant Representative is required to submit prudential information for IESO review.

Submit Emergency Preparedness Plan

The Applicant Representative is required to submit an Emergency Preparedness Plan for market participation. The IESO will review and approve the Emergency Preparedness Plan. If necessary, the Applicant Representative will receive a task for revising and resubmitting the plan.

Confirm Connectivity to IESO Information Systems

The Rights Administrator is required to confirm connectivity to IESO systems. Completing this task only tells the IESO that connectivity has been successfully tested.

Assign Mandatory Access Role

The Rights Administrator is asked to assign mandatory access roles for persons who have been assigned as the Prudential Contact, Market Participant Compliance Contact or the Market Participant Escalation Contact.

Coordinate with Rights Administrators

System access must be assigned by a Rights Administrator for the organization. Rights Administrators are required to submit system access requests using the Manage System Access Action.

Monitor the News Page

Always monitor the News Posts for status and information regarding current market or program requests and tasks.

Cancel a Request

Only one type of Participation Request can be in progress at a time. A new request cannot be started until the entire in-progress request is completed. If needed, the Applicant Representative can cancel an in-progress Manage Participation Request.

To Cancel, choose the Manage Participation Request Action. It will not be possible to resume a cancelled request.

Contact IESO

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