

Step-By-Step Guide for Adding a Contact Role

Use this instructional information to add additional organizational contacts in Online IESO.

1. Click the "Actions" tab, choose "Update Organization".

The screenshot displays the Online IESO web application interface. At the top, a navigation bar contains tabs for 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The 'Actions' tab is highlighted with a green circle. On the left side, there is a sidebar with the IESO logo and a list of applications: 'Manage Meter Installations (1)', 'Prudential System (1)', and 'Registration System (DEV) (5)'. The main content area on the right lists several actions, each preceded by a yellow lightning bolt icon. The 'Update Organization' action is circled in green. The actions listed are: 'Manage Enrolment Requests' (Cancel an In-Progress Enrolment Request), 'Manage Meter Installation' (Register new connections, update existing meter installations and deregister meter installations), 'Manage My Information' (Update Contact Information, Request System Access, Request to Deregister), 'Manage Participation' (Enter Participation in an IESO-Administered Market or Program), 'Manage System Access' (Grant/Revoke System Access to IESO Information Systems. Update IP Address for Machine Accounts), 'Submit Prudential Support Information' (View, manage, update, and calculate prudential support obligation), and 'Update Organization' (Update Organization's General Organization Information, Contacts, Emergency Preparedness).

2. Select the desired organization under "Update Organization Request Type". Select "Update Contact Roles(s)" and click "Next".

The screenshot shows the 'Select 'Update Organization' Request Type' form. The 'Request Details' section includes 'Organization ID:' and 'Organization:'. Below this is the 'Select Request Type' section with a dropdown menu. The dropdown menu is open, showing options: 'Update Contact Role(s)', 'Update Contact Role(s)', 'Update Section', 'Update Organization Information', 'Update Licence', and 'Update Emergency Preparedness Plan'. The first 'Update Contact Role(s)' option is highlighted. To the right of the dropdown is a green 'Next' button and a grey 'Cancel' button. The 'Next' button is circled in green.

3. Select to search "By Person".

The screenshot shows the 'Select an Update Type' form. The 'Request Details' section includes 'Organization ID:', 'Organization:', and 'Request Type: Update Contact Role(s)'. Below this is a 'Need Help?' link with the URL 'http://www.ieso.ca/registration.help/#1.21'. 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 individual's name and click "Search for Person".

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Search for a Registered Person

Request Details

Organization ID:

Organization:

Request Type: Update Contact Role(s) by Person

Search for a Registered Person

Search for the registered person using the following search fields. Enter complete information to retrieve accurate results. At least one field must be filled in for the search. If the person is not found after a search, the person can then be registered.

Person ID

Last Name

First Name

[Need Help?](#)
<http://www.ieso.ca/registration.help/#1.31>

Search for Person

5. Where the individual is not registered, click "Register New Person". If the person is already registered, proceed to step 8.

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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>

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

6. Complete the "Register a New Person" page and click "Next".

The screenshot shows the 'Register a New Person' page in the IESO system. The page has a header with navigation tabs: News, Tasks (13), Records, Reports, and Actions. The IESO logo is on the left. The main content area is titled 'Register a New Person' and contains a 'Request Details' section with fields for Organization ID, Organization, and Request Type (Update Contact Role(s) by Person). Below this is a 'Person Information' section with fields for First Name, Last Name, Main Phone, Main Phone Extension, Main Email, Address Line 1 through 4, City, Province/State, Postal Code/Zip Code, and Country. A 'Need Help?' link is also present. The 'Next' button is circled in green.

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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

* Last Name

* Main Phone

Example: 123-456-7890

Main Phone Extension

Numbers only

* Main Email

* Address Line 1

Address Line 2

Address Line 3

Address Line 4

* City

* Province/State

Outside Canada or USA, select N/A

* Postal Code/Zip Code

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

* Country

[Need Help?](http://www.ieso.ca/registration.help/#1.8)

<http://www.ieso.ca/registration.help/#1.8>

Next

7. Review and confirm the individual registration details.

The screenshot shows the 'Confirm New Person Registration' page in the IESO system. The page has a header with navigation tabs: News, Tasks (13), Records, Reports, and Actions. The IESO logo is on the left. The main content area is titled 'Confirm New Person Registration' and contains a 'Request Details' section with fields for Organization ID, Organization, and Request Type (Update Contact Role(s) by Person). Below this is a 'Person Information' section with fields for First Name, Last Name, Main Phone, Main Phone Extension, Main Email, Address Line 1 through 4, City, Province/State, Postal Code/Zip Code, and Country. A 'Need Help?' link is also present. The 'Confirm' button is circled in green.

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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

Last Name Dow

Main Phone 123-456-7890

Main Email jane@dow.com

Address Line 1 123 fake street

Address Line 2

Address Line 3

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)

<http://www.ieso.ca/registration.help/#1.9>

Confirm Cancel

8. Select the Person ID for the individual to be registered in a new role and click "Next".

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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

First Name

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

Next Refine Search Register New Person Cancel

9. Select the desired contact role and click "Add Contact Role(s)". Once added, click "done".

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

10. Click "Confirm".

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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

ConfirmCancel

Adding a Contact Role, April 2021

6



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