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Introduction

Welcome to Ask ISO, the ISO New England participant support community. Ask ISO includes the following features:

- Access to the Ask ISO application is managed by a username (a unique email address) and password via a supported web browser. A digital certificate is not required to access Ask ISO.
- Individuals associated with a participant and entered into our Customer and Asset Management System (CAMS) are automatically registered to have Ask ISO access. Other stakeholders or individuals wanting to submit questions or a request for Critical Energy Infrastructure Information (CEII) can self-register for Ask ISO.
- Phone calls associated with an open Ask ISO case route directly to the analyst assigned to the case, when they are available. Ask ISO automatically integrates email and phone communications creating a seamless log of communication.
- Knowledge articles are provided in Ask ISO for easy access to frequently asked questions or announcements.
- Users can view all of their past and current cases under one username, even if they are listed under multiple companies in CAMS, so long as the email address recorded with each participant in CAMS is the same.
- A generation survey component is available in Ask ISO that is utilized to obtain the data that is laid out in Operating Procedure No. 21, Operational Surveys, Energy Forecasting & Reporting and Actions During an Energy Emergency (OP-21). A separate user guide is available and named Generator Survey System in Ask ISO User Guide.
- Manage your mailing list subscriptions in the portal to remain up-to-date on communications sent by ISO New England.

The supported browsers for Ask ISO are Google Chrome and Microsoft Edge. For more information regarding browser support, see the Supported Browsers article in the Help section on the Salesforce Trailblazer Community site.

Registering for Ask ISO

There are three ways to register for Ask ISO.

CAMS and Ask ISO Integration

If you are listed under a market participant in CAMS, you will automatically be registered in Ask ISO. Upon being added to CAMS by a company’s designated security administrator (SA), the user will be able to submit cases in Ask ISO under that specific market participant (participant names are referred to as account names in Ask ISO). If the email address used for your profile is the same under each participant in CAMS, then you will be able to submit and view all of your own cases under a single Ask ISO user account.

In order for you to view all Ask ISO cases submitted by individuals associated with your company, you need an elevated permission called External Manager. Your SA must add the role of Ask ISO / External Manager under Application Groups to your user profile in CAMS. If you need to be able to see cases across multiple participants, the SA for each market participant will need to grant you the External Manager role.
Self-Registration

Anyone can register for an Ask ISO account, even if not associated with a market participant. Instructions on registering are below:

To register for Ask ISO:

2. Click Login in the top right corner.
3. Click Not a member?
4. Enter your First Name, Last Name, Email, Phone, Title, Company Name, and a Password.
5. Select I’m not a Robot to complete the Captcha requirement.
6. Click Sign up. You will receive an email that confirms your registration to Ask ISO.

Registration by Participant Support

When you submit an inquiry to Participant Support by phone or email Ask ISO automatically creates a contact for you.

- askiso@iso-ne.com for general inquiries
- memcoord@iso-ne.com for membership or affiliate related requests

If you only interact with us via phone or email, an Ask ISO user account is not automatically created until you self-register or you are added under a participant in CAMS. If you are subsequently added to CAMS with the same email as in the Ask ISO user account, the profiles will synchronize. This will enable you to submit cases under the company listed in CAMS.
Logging in

After you have registered, you can log in to Ask ISO.

To log in to Ask ISO:

2. Enter your email and password.
3. Click Log in.

If you forgot your password, click Forgot your password? This sends a password reset link to your email. You may also reach out to Participant Support for assistance in resetting your password.

Ask ISO Home Page Features

After you log in you are taken to the ISO-NE Support Community page (“Community”), which provides links to common areas of the portal.

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<tbody>
<tr>
<td>A</td>
<td>Home—Returns you to the Community home page from anywhere within Ask ISO.</td>
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<tr>
<td>B</td>
<td>Topics (knowledge articles)—Provide answers to commonly asked questions and concerns. They are categorized by main topics. You can select a topic from the tool bar dropdown, or select a topic from the tiles on the home page.</td>
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<tr>
<td>C</td>
<td>My Cases—Lists all cases, past and present. Ask ISO External Managers (an elevated permission given by your SA) can see all of the cases for their company, regardless of who submitted the case.</td>
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Contacting Support – Submitting a Case

When you have an issue or question, you can submit a case to Participant Support. If you will be submitting a case on behalf of a participant log in using the email address represented in CAMS, as inputted by your company’s SA.

1. Click Contact Support on the Ask ISO toolbar.
2. Enter the following information on the case form:
   - **Account Name**—Select the appropriate participant for your inquiry by searching for the company name. If a company you were expecting to see is not on the list, you have logged in with an email address that is not associated with that participant. Check with your company SA to confirm the email address.
   - **Subject**—Provide a brief summary of your issue.
   - **Category**—Select a category from the drop-down menu. This helps to route your inquiry to the appropriate group:
     - **General Participant Support**—Questions related to settlements, billing, outages & system operations, technical support (including digital certificates), training and ISO-TEN, Day-Ahead Market, Real-Time Market, Financial Transmission Rights, Forward Capacity Market (including resource transfers), and the tariffs.
     - **Membership**—Questions related to becoming a market participant, name changes, affiliate updates, registering your company for system access to engage in external transactions or Financial Transmission Rights, submitting a Forward Capacity Market Non-Market Participant Registration Request, or terminating membership.
     - **Registration & Auditing**—Questions related to claimed capability auditing or registering an asset, or related to the Asset Dashboard in CAMS.
   - **Needed By**—Enter a Date or select a date by using the calendar icon if your case is time sensitive. You can also enter a Time or select a time by using the time icon. For submitting asset registration forms, please enter the requested effective date of the registration.
   - **Description**—Enter a detailed description of the case. This helps enable prompt resolution of the issue by minimizing the need for clarification or additional information.
3. (Optional) Click Add Attachments to add an attachment to the case. Browse and select the file you want to upload. The following file types are accepted: .pdf, .bmp, .tif, .tiff, .gif, .png, .jpg, .jpeg, .html, .vsd, .csv, .xls, .xlsx, .xml, .doc, .docx, .txt, .zip, .zipx, .ppt, .pptx.

**Note:** With the initial case creation, you are only allowed one attachment. To add additional attachments, see adding attachments.

4. Click Submit when finished. You will receive a confirmation email with an Ask ISO case number, in addition to email notifications when your case status is updated.

Note: Next to the Submit a Case form on the Contact Support page, is a list of suggested articles. As you type the Subject on the form, Ask ISO searches for knowledge articles and displays links to those that might be helpful. The articles will appear on the right side of the page. Click on an article to read it.

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**Monitoring and Updating Your Cases**

Click My Cases in the toolbar to see your case list. On your My Cases page, you can see a list of cases, with their corresponding Case Number, the Contact Name (who submitted the issue), the Subject, and the Status of the case. To view the details of a case, click a case number. When you select a case, you can attach files to it.
To add attachment(s):

1. Click My Cases on the Ask ISO Tool bar.

2. Click a case number on the My Cases page.

3. Click the Attachments tab. The following file types are accepted: .pdf, .bmp, .tif, .tiff, .gif, .png, .jpg, .jpeg, .html, .vsd, .csv, .xls, .xlsx, .xml, .doc, .docx, .txt, .zip, .zipx, .ppt, .pptx.

4. Scroll to the Files area to attach a file. There are two methods for file attachment:
   - Click Upload Files and the File Upload dialog box opens. Use the dialog box to browse for new files to add to Ask ISO. You can also drag and drop files into the Files area.
   - Click Add Files and the Select Files dialog box opens. Use this dialog box to upload documents that you previously uploaded to Ask ISO. Click Add to attach the file to the case.

When you have successfully uploaded the file, you will receive a confirmation banner.
Sending a Message to a Participant Support Analyst

Each case is assigned an ISO analyst. You will receive an email notification automatically when your case is submitted and again when the case is resolved. You can contact your case analyst on the Case page.

To send a message to the assigned analyst

1. Click My Cases on the Ask ISO toolbar.
2. Click a case number on the My Cases page.
3. Type a comment in the Write a comment text box, using the @Name function to notify the analyst. (Type @, begin typing the analyst’s name, and select their name from the options that appear as you type.) The analyst assigned to your case will receive the comment. You can add an attachment to the comment by clicking the paperclip beneath the text box.
Requesting access to Critical Energy Infrastructure Information (CEII)

Ask ISO supports the process for employees or agents of entities who are not governance participants\(^1\) to access CEII by accepting electronic submission of the Critical Energy Infrastructure (CEII) Request Form, which includes a non-disclosure agreement. The form facilitates a request to access information that is classified by ISO New England as CEII. ISO New England defines CEII materials consistent with the Federal Energy Regulatory Commission (“FERC”) definition.\(^2\)

Employees or agents of governance participants gain access to most CEII materials by way of permissions in CAMS. The requestor must be registered by their SA in CAMS in order to gain access CEII materials. Once registered, identified employees of governance participants can access and request CEII materials. Under certain scenarios, employees or agents of governance participants may be directed to submit a discrete request in Ask ISO.

Employees or agents of entities who are not governance participants must complete, sign, date, and return the CEII access request form in Ask ISO prior to ISO New England authorizing access to CEII. Log in to Ask ISO to access the [CEII Requests page](#). (See the Self-Registration section above for details on registering for access). Select "Start a New CEII Access Request" to access the form.

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\(^1\) A governance participant is a NEPOOL participant, individual participant or governance-only member.

\(^2\) FERC defines CEII as “specific engineering, vulnerability, or detailed design information about proposed or existing critical infrastructure that: (1) relates details about the production, generation, transportation, transmission, or distribution of energy; (2) could be useful to a person in planning an attack on critical infrastructure; (3) is exempt from mandatory disclosure under the Freedom of Information Act, 5 U.S.C. 552 (2000); and (4) does not simply give the general location of the critical infrastructure.”
Managing Mailing Lists and Subscription Lists

ISO New England uses various mailing lists to identify interested or affected parties for operational and informational messaging. You can review which managed and subscription-based mailing lists you are on in your Ask ISO account. On this tab, either you, or your company’s SA, can subscribe or unsubscribe as appropriate.

**Managed Lists** are used to create lists of affected parties based on attributes associated with person records in our systems. For example, a person record in CAMS will contain attributes or fields such as contact type, committee assignments, asset or resource contacts, or will specify access to an application. Users can see which managed lists they are on, use mailing list descriptions to determine why they are included in a particular list, and send attribute update requests directly to their SAs if they are on lists that do not pertain to them.

**Subscribable Lists** allow Ask ISO users to take action on their subscriptions from the Mailing Lists tab. This replaces the subscription options on the ISO New England [Mailing Lists] webpage.

Further details can be found in step-by-step knowledge articles describing the available list types and how they are managed below:

- [How to Manage your ISO Mailing List Subscriptions](#)
- [What Types of Mailing Lists are Managed Through Ask ISO?](#)

### Glossary

**Account**—Ask ISO term for a participant. For market participants or other ISO customers, the account corresponds to the customer (and customer ID) maintained in CAMS.
**Case**—Replaces the term “Issue” used in the previous Ask ISO system. All inquiries, form submissions, or requests are tracked in a case and issued a unique identifier.

**Knowledge Article**—Provides answers to commonly asked questions and concerns.