



Ask ISO User Guide

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JANUARY 2023

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Introduction

Ask ISO is the ISO New England participant support community used to manage communications between ISO personnel, participants, non-participants, and stakeholders. Ask ISO is built on the Salesforce Service Cloud platform and it is integrated with other ISO systems to allow various forms of communication and data to be assigned to records in Ask ISO.

The functionality and features available in Ask ISO include the following:

- 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 participant or non-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

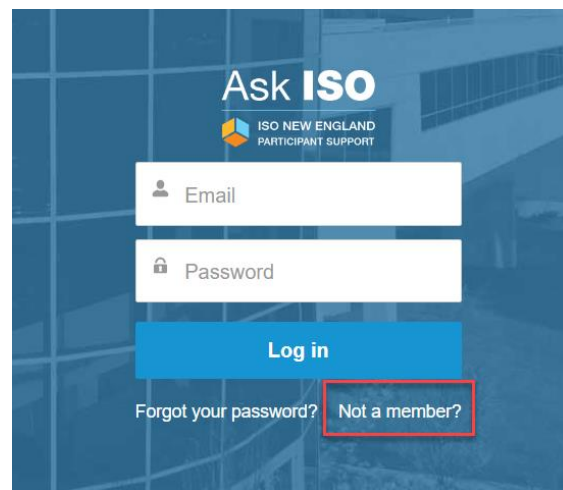
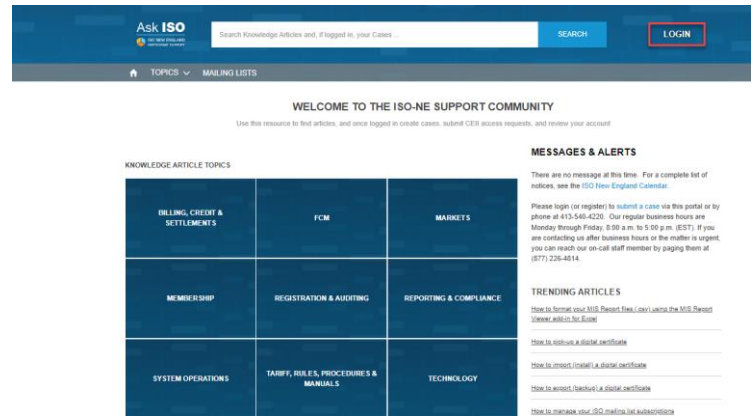
Application Groups to your user profile in CAMS. If you need to be able to see cases across multiple participants, the SA for each market participant will need to grant you the *External Manager* role.

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:

1. Go to <https://askiso.iso-ne.com>.
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.

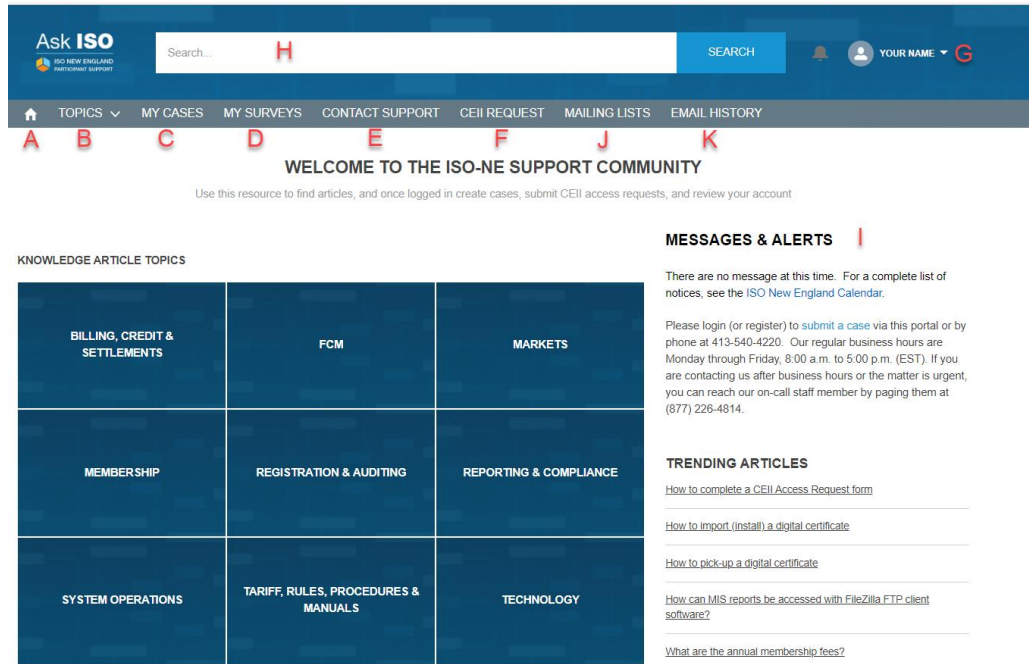
To log in to Ask ISO:

1. Navigate to <https://askiso.iso-ne.com>.
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 Community 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.



A	Home —Returns you to the Community home page from anywhere within Ask ISO.
B	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.
C	My Cases —Lists all cases, past and present. Ask ISO External Managers (an elevated permission assigned by your SA in CAMS) can see all of the cases for their company, regardless of who submitted the case.

D	My Surveys —Lists all open or closed generation surveys. To access your surveys, your SA must grant the Ask ISO / Survey Viewer or Ask ISO / Maintainer access in CAMS. See the Generation Survey System in Ask ISO User Guide for details.
E	Contact Support —Links to the page where you can submit a case to Participant Support.
F	CEII Request —Provides access to the online form to submit access to Critical Energy Infrastructure Information (CEII).
G	Manage Your Account —Provides a menu of options and links: <ul style="list-style-type: none"> • Home—Returns you to the Community home page from anywhere within Ask ISO. • My Profile—Enables you to edit your name and photo, which displays to Participant Support only. • My Settings—Enables you to edit your email, preferred location, time zone, profile visibility, and email notifications. • Contact Support—Links to the page where you can submit a case to Participant Support. • My Account—Enables you to view your account details. • Logout—Ends your Ask ISO session.
H	Search —Searches knowledge articles and cases by keyword, topic, or case number.
I	Messages & Alerts —Displays your latest messages and alerts and provides a link to the ISO New England Calendar.
J	Mailing Lists – Allows the user to review their Mailing and Subscription Lists.
K	Email History – Provides a view to applicable users to review past notices sent to them from ISO New England.

Contacting Support – Submitting a Case

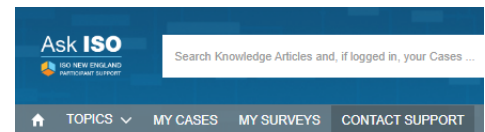
When you have an issue or question, you can submit a case to Participant Support. If you will be submitting a case on behalf of a participant, log in using your email address in CAMS.

1. Click **Contact Support** on the Ask ISO toolbar.



2. Enter the following information on the case form:

- **Account Name**—Select the appropriate participant or non-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 company. Check with your 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.



Note:

From the list of companies below, please start typing the market participant for your request. If the company you were expecting is not on the list, please make sure you are logging in to Ask ISO using the email address associated with the company you represent. You may be able to work with the Security Administrators for the companies you represent.

SUBMIT A CASE TO PARTICIPANT SUPPORT

ACCOUNT NAME

* SUBJECT

* CATEGORY

--None--

NEEDED BY

Date Time

* DESCRIPTION

[Add Attachment\(s\)](#)

SUBMIT

- (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](#).
- 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.

YOUR ANSWER MIGHT BE IN THESE ARTICLES.

- Will market participants be notified of a capacity scarcity condition (... Jul 16, 2018
- Customer and Asset Management System (CAMS) and Digital Certi... Jul 16, 2018

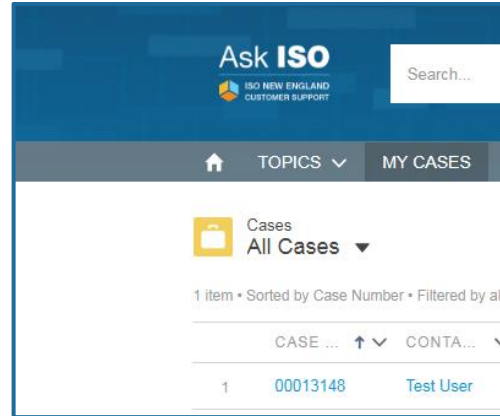
Monitoring and Updating Your Cases

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.

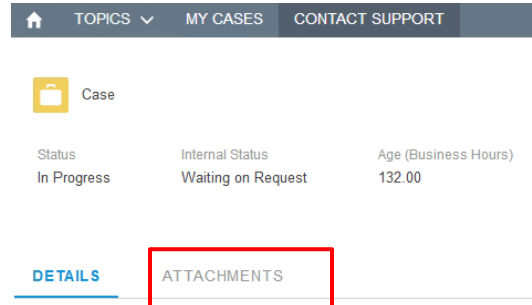
The screenshot displays the Ask ISO web application interface. At the top, there is a navigation bar with the Ask ISO logo and a search bar. Below the navigation bar, there is a menu with options: TOPICS, MY CASES, MY SURVEYS, CONTACT SUPPORT, CEII REQUEST, MAILING LISTS, and EMAIL HISTORY. The 'MY CASES' section is active, showing a dropdown for 'All Cases' and a search bar for the list. Below the search bar, there is a table with columns: Case Number, Contact Name, Subject, Status, Account Name, Date/Time Opened, and Date/Time Closed. The table currently shows 0 items.

To add attachment(s):

1. Click **My Cases** on the Ask ISO Tool bar.
2. Click a case number on the *My Cases* page.

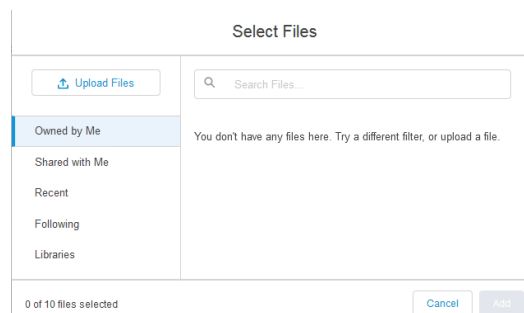
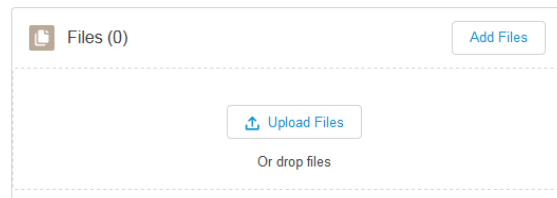


3. Click the **Attachments** tab. The following file types are accepted: .pdf, .bmp, .tif, .tiff, .gif, .png, .jpg, .jpeg, .html, .vsd, .csv, .xls, .xlsx, .xml, .doc, .docx, .txt, .zip, .zipx, .ppt, .pptx.



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.



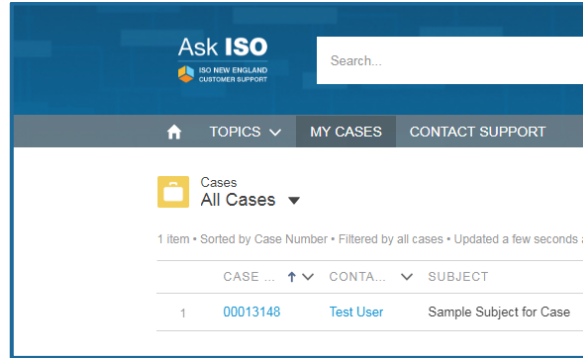
When you have successfully uploaded the file, you will receive a confirmation banner.

Sending a Message to a Participant Support Analyst

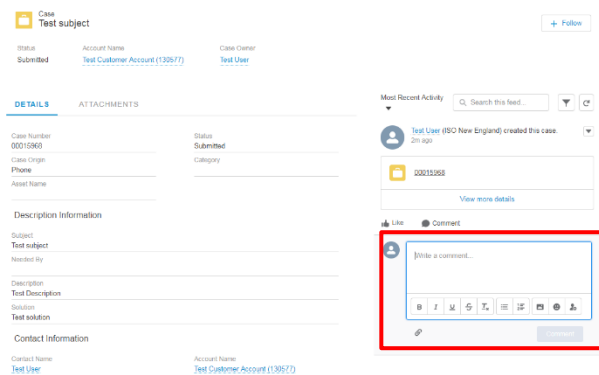
Each case is assigned to an analyst. You will receive an email notification automatically when your case is submitted and again when the case is resolved. You can contact your case analyst on the *Case* page.

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 participants¹ 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.

Ask ISO
ISO NEW ENGLAND
INTERSTATE SUPPORT

Search... SEARCH

YOUR NAME

TOPICS MY CASES MY SURVEYS CONTACT SUPPORT **CEII REQUEST** MAILING LISTS EMAIL HISTORY

Critical Energy Infrastructure Information (“CEII”) Access Request Form Instructions

The CEII Request and Non-disclosure Agreement forms facilitate a request to access for information that is classified by ISO New England Inc. (“ISO-NE”) as CEII. For your information, ISO defines CEII materials consistent with the Federal Energy Regulatory Commission (“FERC”) definition, which is “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.” In addition to gaining access to CEII materials by way of the following, the application of the ISO New England Information Policy may also limit an entities ability to access CEII materials.

- Employees or agents of Governance Participants gain access to CEII materials by way of permissions in the ISO’s Customer and Asset Management System (CAMS).^[1] The requestor must be registered by their Security Administrator as a Person in CAMS in order to gain access ISO CEII materials. Once this is the case, identified employees of Governance Participants can access and request ISO CEII materials.
- Employees or agents of entities who are not Governance Participants to gain access to CEII materials must complete, sign, date, and return this online form prior to ISO authorizing you access to such materials (select “[Start a New CEII Access Request](#)” when ready to begin filling out the form):
 - a. Ask ISO CEII Access Request Form; and
 - b. Non-Disclosure Agreement (unless you are employed by FERC, in which cases the ISO New England Information Policy applies and the NDA is not required)

This form requests access to CEII provided via:

- the Planning Advisory Committee;
- the Reliability Committee;
- the Interconnection Request process; and
- a discrete request of CEII materials.

Start a New CEII Access Request

YOUR ANSWER MIGHT BE IN THESE ARTICLES

[How to complete a CEII Access Request form Jul 16, 2021](#)

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

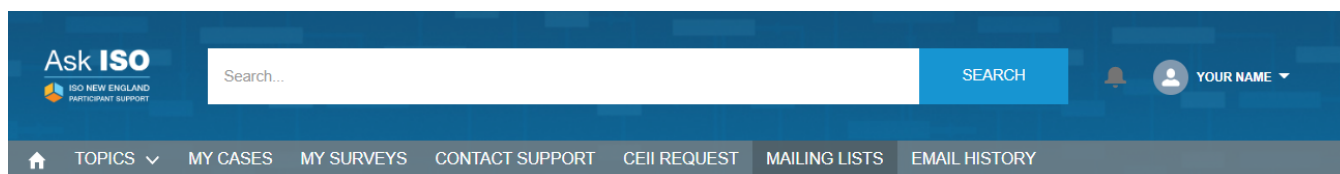
ISO New England uses various mailing lists to identify interested or affected parties for operational and informational messaging. You can review which managed and subscription-based mailing lists you are on in your Ask ISO account. On this tab, you and your company's SA can subscribe or unsubscribe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



Subscriptions

My Subscribable Lists

Using the buttons in the Actions column of the table below, you may subscribe to or unsubscribe from the lists shown at any time. Switch this view to "All Subscriptions" for a full list of all subscribable mailing list options. See the [knowledge article](#) for additional guidance on mailing lists.

Show 10 entries

Search:

List Name	Description	Category	Action
No data available in table			

Showing 0 to 0 of 0 entries

Previous Next

Glossary

Account—Ask ISO term for a participant or non-participant company which corresponds to the customer (and customer ID) maintained in CAMS.

Case—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.