Corporate Address and Contact Management Tool

Overview

- MISO has created a tool to enable registered external entities to manage contact and corporate address details.
- This tool eliminates the need for Attachment B or Change of Information Forms for contact changes only. Entities can continue to use the Attachment B or Change of Information form until April 1, 2020, at which time users must make contact updates through the Corporate Address and Contact Management Tool.
- Access procedures require a digital certificate and associated role to be provisioned by your company's Local Security Administrator (LSA).
- This tool does not replace the Self-Service LSA Tool used for portal user management by your registered LSA.
- In accordance with internal compliance standards and the LSA Policy, MISO is responsible for the creation and maintenance of LSA contacts. For assistance with LSA accounts, please contact Client Services and Readiness at help@misoenergy.org.
- This tool does not replace processes for updating Universal Non-Disclosure Agreement Appendix A, mailing list subscriptions, or maintenance of membership contacts; contact Client Relations for assistance with such updates at help@misoenergy.org.

Obtaining Access to the Corporate Address and Contact Management Tool

The registered Local Security Administrator (LSA) within your organization can provision access to the Corporate Address and Contact Management tool. To provision access to the new tool, the LSA must use the Self-Service LSA (SSLSA) tool and add the following role to a user with a valid certificate:

- Contact Management Tool (update)

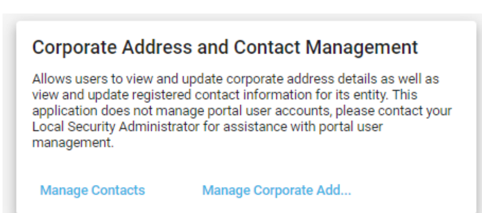
Note that access is per registered entity. If a user needs to update contact or address information for multiple companies, that user would need separate digital certificates setup for each registered entity.

Navigating to the Corporate Address and Contact Management Tool

Once the role has been provisioned by the LSA, the user can access the Corporate Address and Contact Management Tool by navigating to the Corporate Address and Contact Management Tool card on the Market Portal landing page.

To manage your organization's contacts, the user must select the Manage Contacts link on the Corporate Address and Contact Management card as seen in the screen shot below.

To manage your organization's corporate address, the user must select the Manage Corporate Address link on the Corporate Address and Contact Management card as seen in the screen shot below.



Once inside the tool, a user can also navigate using the links in the header bar.

Using the Tool for Contact Management

Either selecting the Manage Contacts link on the Corporate Address and Contact Management card, or selecting Contacts from the page header, allows the user to view registered contacts for your entity. As a reminder, this tool does not replace the Self-Service LSA Tool used for portal user management by your registered Local Security Administrator.

From the Manage Contacts link, a user can:

- View Contacts
- Create New Contacts
- Edit Contacts
- Inactivate Contacts
- Export Contacts
- Search

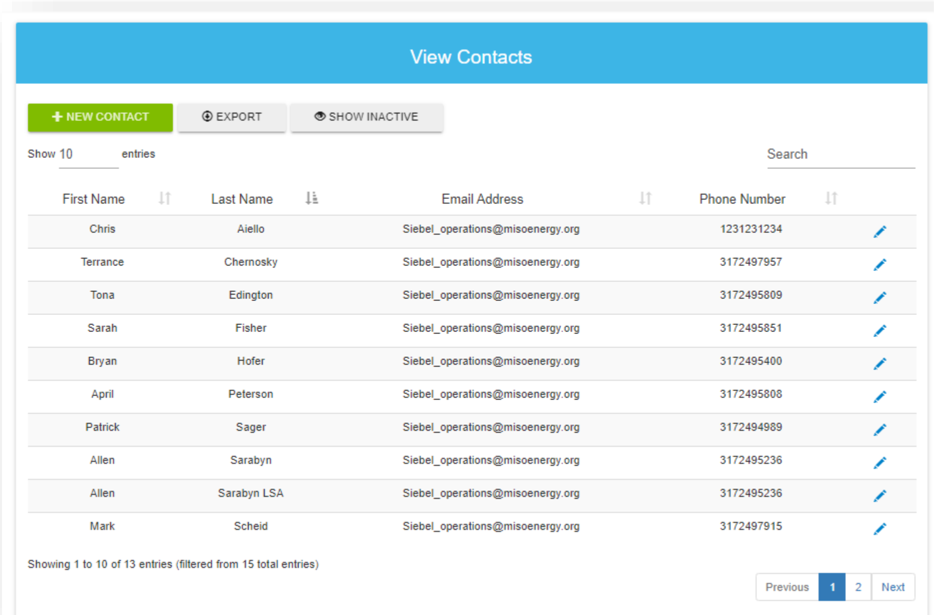
Depending on your entity type, there will be a defined list of contact types that can be managed through this tool. A list of these contact types, along with descriptions, can be found in the appendix of this user guide. If there are any questions regarding the contact types for your entity, please contact Client Services and Readiness at help@misoenergy.org.

Reminder: In accordance with internal compliance standards and the LSA Policy, MISO is responsible for the creation and maintenance of LSA contacts. Contacts with the LSA designation will be visible through this tool but the Primary or Secondary Local Security Administrator contact types cannot be added or removed. For assistance with LSA accounts, please contact Client Services and Readiness at help@misoenergy.org.

Viewing Contacts

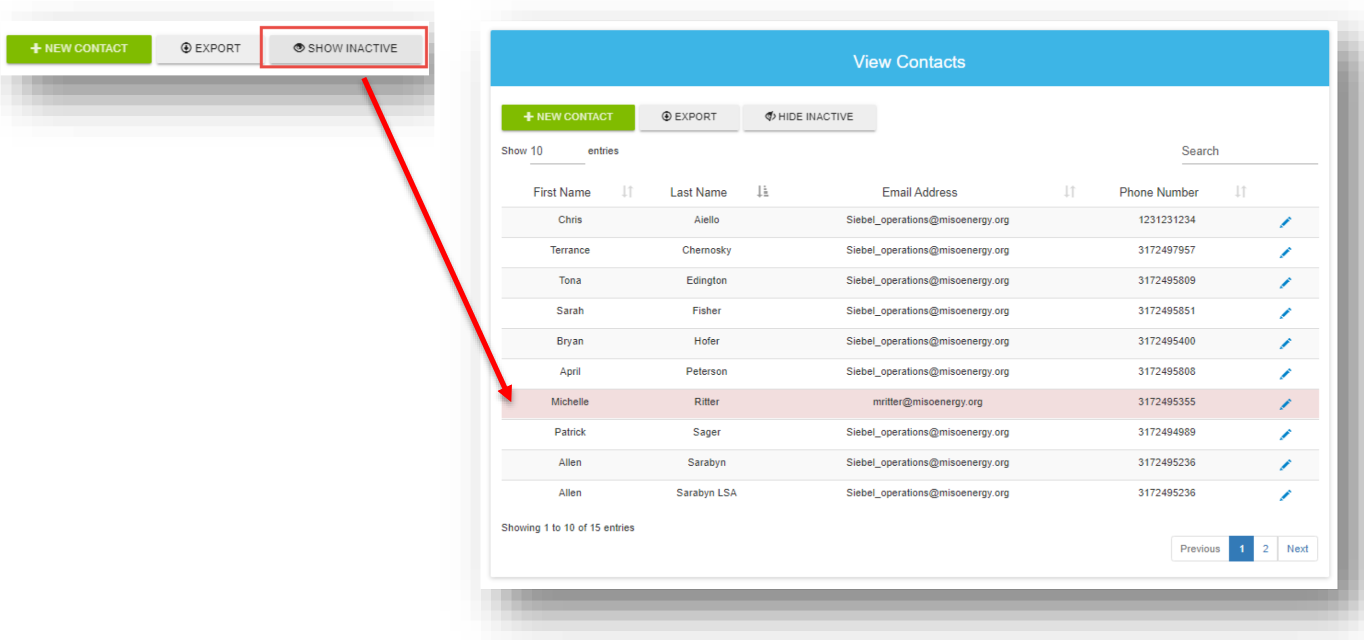
To view contacts, select the Manage Contacts link from the Corporate Address and Contact Management card or by select Contacts from the header. By default, the tool will show all **Active** contacts for your entity.

> ***Tip***: Clicking on any of the column headers will sort that column.



First Name	Last Name	Email Address	Phone Number
Chris	Aiello	Siebel_operations@misoenergy.org	1231231234
Terrance	Chernosky	Siebel_operations@misoenergy.org	3172497957
Tona	Edington	Siebel_operations@misoenergy.org	3172495809
Sarah	Fisher	Siebel_operations@misoenergy.org	3172495851
Bryan	Hofer	Siebel_operations@misoenergy.org	3172495400
April	Peterson	Siebel_operations@misoenergy.org	3172495808
Patrick	Sager	Siebel_operations@misoenergy.org	3172494989
Allen	Sarabyn	Siebel_operations@misoenergy.org	3172495236
Allen	Sarabyn LSA	Siebel_operations@misoenergy.org	3172495236
Mark	Scheid	Siebel_operations@misoenergy.org	3172497915

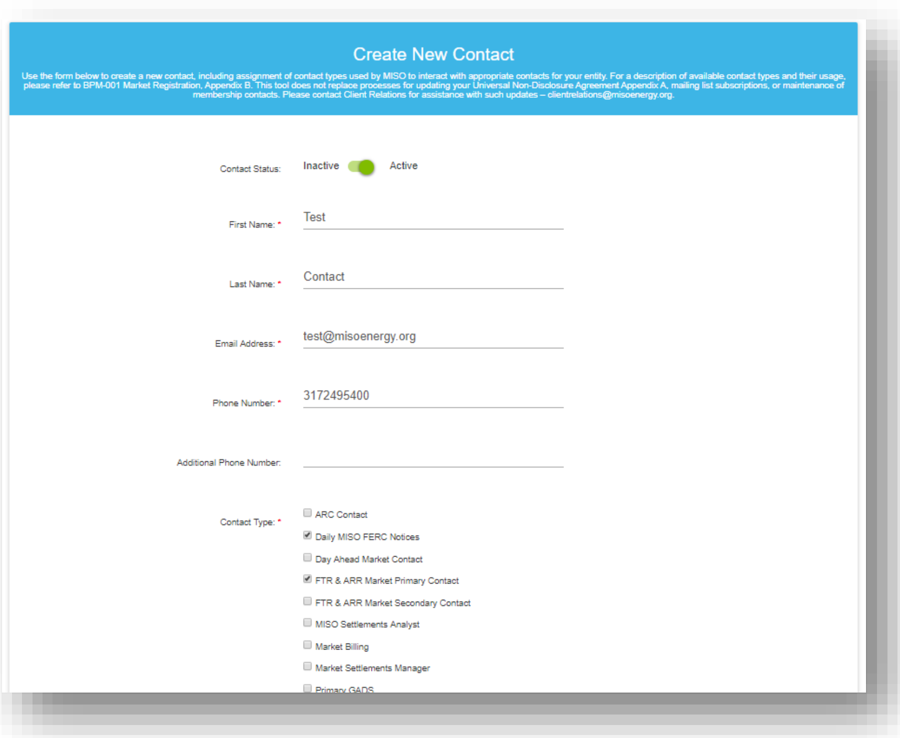
If you wish to view **Inactive** contacts within the list view, select the Show Inactive button. Inactive contacts will be highlighted in pink.



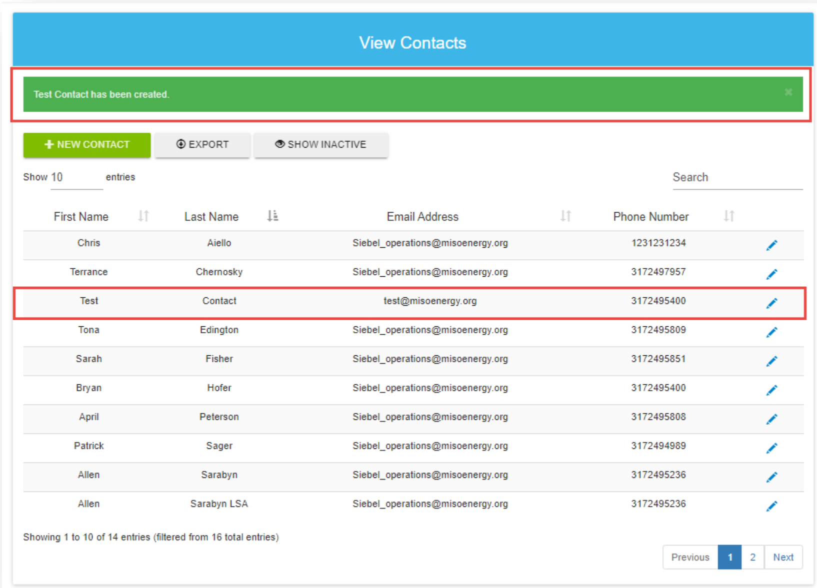
Adding Contacts

To add a contact, select the New Contact button.

Contacts are created with a status of **Active** by default. All fields with a red asterisk (*) are required. A contact must have at least one Contact Type assigned. A list with descriptions of these contact types can be found in the appendix of this user guide. If there are any questions regarding the contact types for your entity, please contact Client Services and Readiness at help@misoenergy.org.

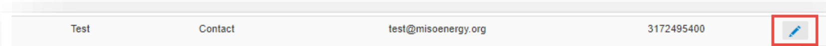


Once all required fields are completed, select Submit. A success message will be visible on the View Contacts page to indicate that your changes saved successfully. You will also see your contact added to your contact list.



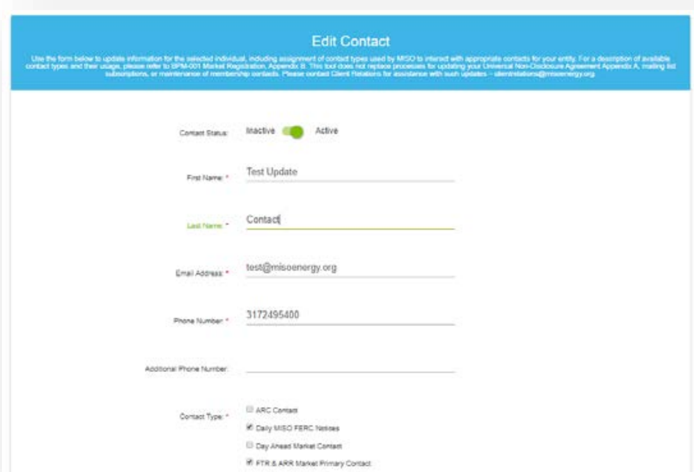
Editing Contacts

To edit a contact, simply select the pencil icon next to the contact you wish to edit.

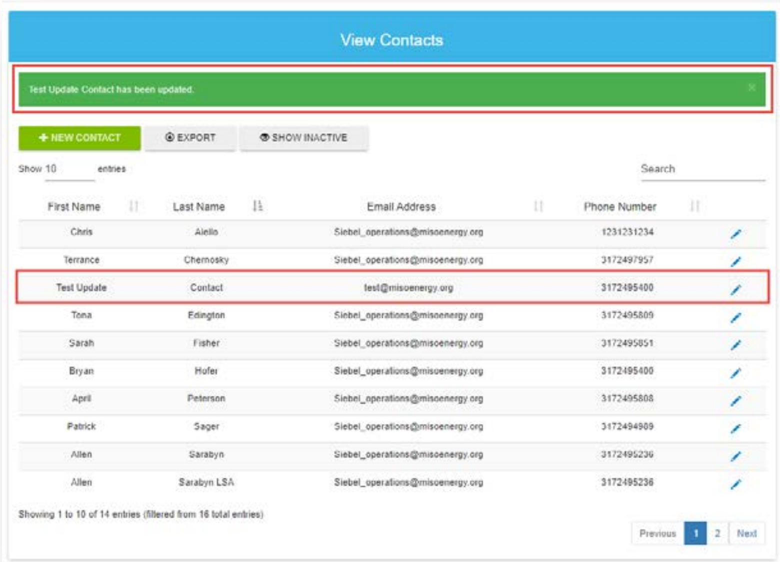


Details for that contact will then be visible. Contact information and contact types can be edited using this form. All fields with a red asterisk (*) are required.

Reminder: In accordance with internal compliance standards and the LSA Policy, MISO is responsible for the creation and maintenance of LSA contacts. Contacts with this designation will be visible through this tool but the Primary or Secondary Local Security Administrator contact types cannot be added or removed. For assistance with LSA accounts, please contact Client Services and Readiness at help@misoenergy.org.

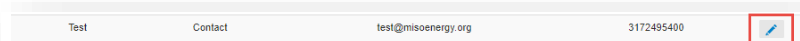


Once all required fields are completed, select Submit. A success message will be visible on the View Contacts page to indicate that your update saved successfully.



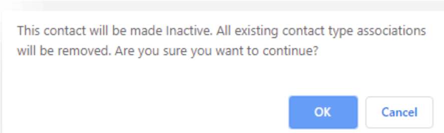
Making a Contact Inactive

To change the status of a contact, start by selecting the pencil icon next to the contact you wish to edit.



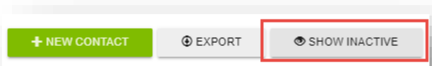
To change the status, simply slide the Contact Status indicator to **Inactive** and select Submit. **Please note:** This action does <u>not</u> replace the Self-Service LSA Tool used for portal user management by your registered LSA.

You will be prompted with a warning message prior to saving your changes. If you wish to proceed with making the contact **Inactive**, select OK.

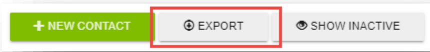


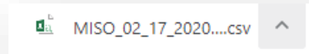
Exporting Contacts

The Export function will export the list of contacts visible on your screen. By default, the Export function will export only **Active** contacts. If you wish to include **Inactive** contacts, you must first select the Show Inactive button.



To export your contact list, select the Export button. Then, depending on your browser configuration settings, your file will either download automatically or you may be prompted to download the file.

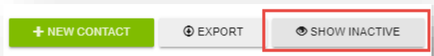




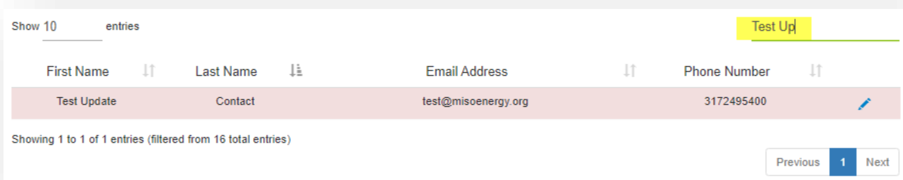
The exported contact list file will be in .csv format by default and will include entries from the following fields for contacts associated with your entity: First Name, Last Name, Email Address, Phone, Contact Status and Contact Type.

Searching for a Contact

The Search function will filter the list of contacts visible on your screen based on your search criteria. By default, the Search function will search **Active** contacts. If you wish to include **Inactive** contacts, you must first select the Show Inactive button.

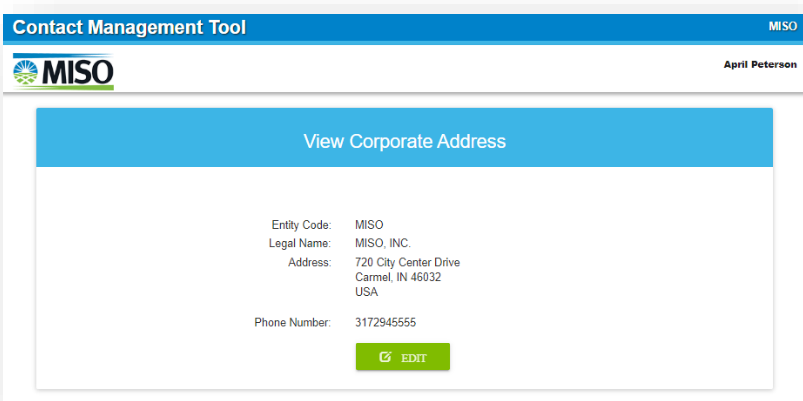


To search, simply start typing your search criteria in the search box and your contact list will begin to filter down based on the entered criteria. To clear the search, delete your entry in the search box.



Using the Tool for Corporate Address Management

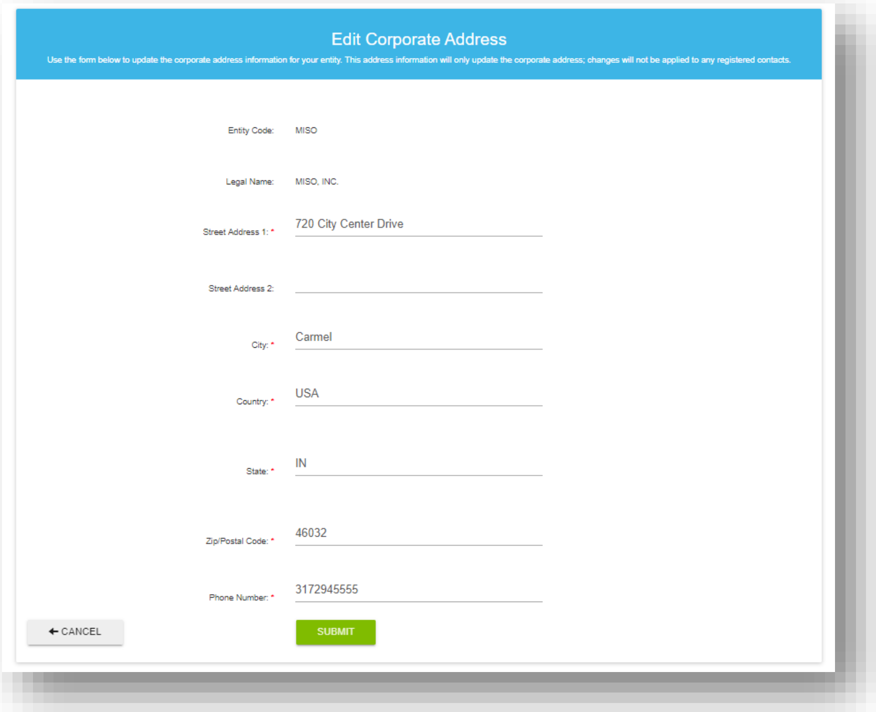
Either selecting the Manage Corporate Address link on the Corporate Address and Contact Management card, or selecting Company from the header, displays the corporate address on file with MISO for your entity. Updating address information will only update your corporate address. Address changes will <u>not</u> be applied to any registered contacts.



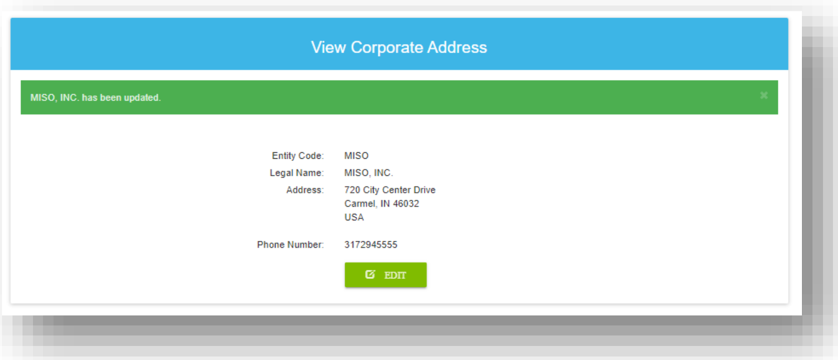
Editing Corporate Address

To edit the corporate address for your entity, select the Edit button as show in the above screen shot.

A new window will open that will allow you to update address details. To update your information, type an entry into the field that needs to be edited. All fields with a red asterisk (*) are required.

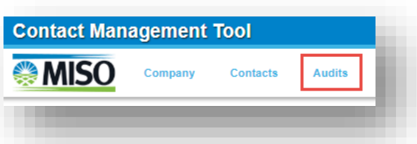


Once you have completed your updates, select Submit. A success message will be visible on the View Corporate Address page to indicate that your changes were saved successfully.

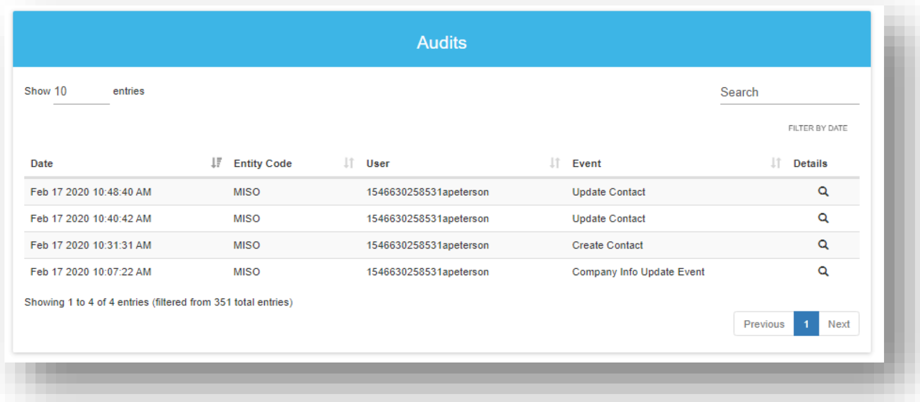


Viewing Audit Information

All changes to contacts and corporate address information are logged and are viewable through the Audits page of the Corporate Address and Contact Management tool. To access audit details, select the Audits link in the header of the tool.

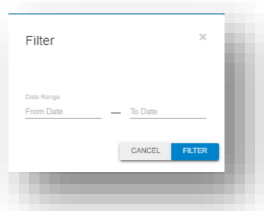


Audit details are displayed by date with the most recent at the top. The audit records will display the date of the change, your Entity Code, the user who made the change, and the type of change. You can also view the details for the change.

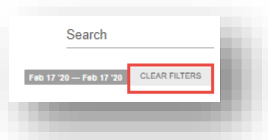


From this view, a user can search for audit records by typing in the search box. Like the View Contacts page, the search function filters the audit data based on the search criteria entered.

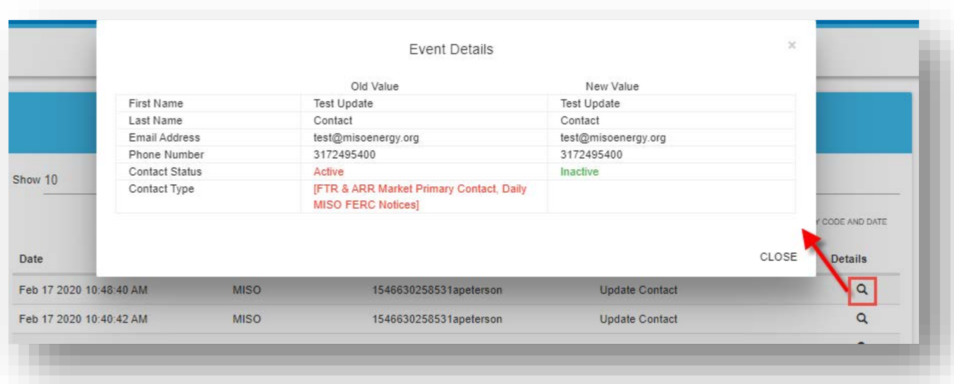
Additionally, users can filter by date. To filter by date, select the Filter By Date link located under the search box. Enter in the date criteria and select Filter.



To remove the date filter, select Clear Filters.



To view details for a specific audit event, select the magnifying glass next to the audit record. A new window will open to show the entries before and after the change. Select Close to close the event details window.



Appendix – Contact Type Descriptions

MISO classifies registered customers into different categories based on their legal agreements. Each category of customer has a different set of available Contact Types to ensure that appropriate individuals are on file.

This Appendix will describe contact types for the following customer categories. If there are any questions regarding the contact types for your entity, please contact Client Services and Readiness at help@misoenergy.org.

Market Participant Contact Types

General Contact	Serves as the main point of contact for MISO. This individual is authorized to submit the Market Participant (MP) application and is also responsible for submitting and signing all legal documents, including the Attachment B – Notice of Change of Information form, and confirming any registered assets.
Authorized Contact	Individual who is authorized to execute any legal agreements with MISO on behalf of the entity. This individual may also receive inquiries from MISO in the event the General Contact is unavailable.
Primary Local Security Administrator **Cannot be added/removed using this tool*	The individual that performs the Local Security Administrator (LSA) role will have the ability to establish and manage the access of the employees of their company to all or part of the information available in MISO Market Systems. Each MP is responsible for identifying an individual(s) to perform the LSA function, as Portal User account maintenance is the responsibility of the MP, not MISO.
Secondary Local Security Administrator **Cannot be added/removed using this tool*	Serves as a secondary point of contact in the event that the Primary LSA contact is unavailable. It is highly recommended to have a secondary LSA on file with MISO.
Primary Credit Contact	Responsible for all ongoing communications with MISO related to Credit. This includes, but is not limited to, notifying MISO of any material changes in status. This individual is the first point of contact for all credit and financial matters.
Secondary Credit Contact	Serves as a secondary point of contact for credit related issues if the Primary Credit contact is unavailable.
Market Billing Contact	Receive remittance advices for Market revenue and quarterly interest payments on cash collateral; may designate up to (3) Market Billing Contacts. MISO can provide billing information (i.e. invoice copies) only to approved Market Billing Contacts.
Transmission Billing Contact	Receive Transmission invoices, Open Invoice Status Reports, and remittance advices; may designate up to (3) Transmission Billing Contacts. MISO can provide billing information (i.e. invoice copies, OISRs, etc.) only to individuals registered as Transmission Billing Contacts.
MISO Settlements Analyst	Individual who verifies the charge types for transactions in the MISO Portal for that Settlement period.
Market Settlements Manager	Individual who oversees all of the Settlement accounting activities (specific to Market Settlements).
Alternative Dispute Resolution	Serves as the primary point of contact for the Alternative Dispute Resolution process.

Public Relations	Serves as the primary point of contact for any questions related to public relations.
Regulatory Counsel	Serves as the primary point of contact for any legal matters pertaining to the entity.
Data Integrity	Individual who is contacted if MISO identifies a problem or discrepancy in the transaction data submitted to MISO, most likely someone in an operations area.
Primary Resource Adequacy	Responsible for ensuring that the organization is compliant with the MISO Resource Adequacy construct including where applicable qualification of Planning Resources, providing annual and monthly resource plans, participating in the Voluntary Capacity Auction and designating capacity to cover the demand forecast plus PRM.
Secondary Resource Adequacy	Serves as a secondary point of contact in the event that the Primary Resource Adequacy contact is unavailable.
Primary GADS	Responsible for ensuring that the organization is compliant with MISO GADS data requirements on a quarterly basis.
Secondary GADS	Serves as a secondary point of contact in the event that the Primary GADS contact is unavailable.
ARC Contact	Responsible for responding to MISO inquiries as necessary related specifically to Demand Response Resource Enrollments. This may also be the contact organization responsible for providing information pertaining to registered ARC Locations.
Day Ahead Market Contact	Responsible for daily submission of Bid and Offer data into the Day Ahead Market including resolution of data submission issues prior to (or immediately after) the close of the Day Ahead Market. Required for all Market Participants
FTR & ARR Primary Contact	Primary point of contact for submission of Bids and Offers data into the Financial Transmission Rights (FTRs) Auctions and Annual Auction Revenue Rights (ARRs) Market including resolution of data submission issues. Required for any Market Participant participating in FTR and/or ARR activities
FTR & ARR Secondary Contact	Secondary contact point of contact for submission of Bids and Offers data into the Financial Transmission Rights (FTRs) Auctions and Annual Auction Revenue Rights (ARRs) Market including resolution of data submission issues.
Daily FERC Notices	Consistent with FERC regulations requiring MISO to serve interested parties, at least one individual must be named as Daily FERC Notices contact. This contact will receive information related to MISO's FERC filings or Tariff**.**

Local Balancing Authority Contact Types

General Contact	Individual who is authorized to make decisions on behalf of your entity, including submitting and signing any legal documentation or submitting Change of Information documentation. This individual should also be able to route any MISO inquiries to the appropriate subject matter experts within your entity.
Secondary Contact	This individual may receive inquiries from MISO in the event the General Contact is unavailable. Individual is authorized to submit and sign any legal documentation or Change of Information documentation if the General Contact is unavailable.
Legal / Regulatory Contact	Serves as the primary point of contact for any legal or regulatory matters pertaining to the entity.
Technical Contact	Point of contact for any technical questions related to connectivity, systems, or data.
Transmission Billing	Individual designated to receive and process invoices from MISO or answer billing related questions.
LBA Operations	This individual will receive daily notification via email (around 5:30PM EST) that the Day-Ahead Sufficiency Report (DASR) containing DRRs with Day-Ahead Schedules for Energy is available via the MISO Market Portal. Every LBA must have at least (1) contact designated with this contact type.
Control Room Manager Primary Contact	Individual who manages the individuals authorized to make operational decisions on behalf of your entity in the operation of the Bulk Power System.
Local Security Administrator (Primary) **Cannot be added/removed using this tool*	Individual that performs the Local Security Administrator (LSA) role has the ability to establish and manage the access of the employees of their entity to all or part of the information available in MISO Market Systems. Each LBA is responsible for identifying an individual(s) to perform the LSA function, as the user account maintenance is the responsibility of the LBA, not MISO.
Local Security Administrator (Secondary) **Cannot be added/removed using this tool*	Serves as a secondary point of contact in the event that the Primary LSA contact is unavailable. It is highly recommended to have a secondary LSA on file with the MISO.

Transmission Owner (non-LBA) Contact Types

General Contact	Individual who is authorized to make decisions on behalf of your entity, including submitting and signing any legal documentation or submitting Change of Information documentation. This individual should also be able to route any MISO inquiries to the appropriate subject matter experts within your entity.
Secondary Contact	This individual may receive inquiries from MISO in the event the General Contact is unavailable. Individual is authorized to submit and sign any legal documentation or Change of Information documentation if the General Contact is unavailable.
Legal / Regulatory Contact	Serves as the primary point of contact for any legal or regulatory matters pertaining to the entity.
Technical Contact	Point of contact for any technical questions related to connectivity, systems, or data.
Transmission Billing	Individual designated to receive and process invoices from MISO or answer billing related questions.
Local Security Administrator (Primary) **Cannot be added/removed using this tool*	Individual that performs the Local Security Administrator (LSA) role has the ability to establish and manage the access of the employees of their entity to all or part of the information available in MISO Market Systems. Each LBA is responsible for identifying an individual(s) to perform the LSA function, as the user account maintenance is the responsibility of the LBA, not MISO.
Local Security Administrator (Secondary) **Cannot be added/removed using this tool*	Serves as a secondary point of contact in the event that the Primary LSA contact is unavailable. It is highly recommended to have a secondary LSA on file with the MISO.

Reliability Coordination Service or Entity Outside of MISO's Footprint Contact Types

General Contact	Individual who is authorized to make decisions on behalf of your entity, including submitting and signing any legal documentation or submitting Change of Information documentation. This individual should also be able to route any MISO inquiries to the appropriate subject matter experts within your entity.
Secondary Contact	This individual may receive inquiries from MISO in the event the General Contact is unavailable. Individual is authorized to submit and sign any legal documentation or Change of Information documentation if the General Contact is unavailable.
Legal / Regulatory Contact	Serves as the primary point of contact for any legal or regulatory matters pertaining to the entity.
Technical Contact	Point of contact for any technical questions related to connectivity, systems, or data.
Local Security Administrator (Primary) **Cannot be added/removed using this tool*	Individual that performs the Local Security Administrator (LSA) role has the ability to establish and manage the access of the employees of their entity to all or part of the information available in MISO Market Systems. Each LBA is responsible for identifying an individual(s) to perform the LSA function, as the user account maintenance is the responsibility of the LBA, not MISO.
Local Security Administrator (Secondary) **Cannot be added/removed using this tool*	Serves as a secondary point of contact in the event that the Primary LSA contact is unavailable. It is highly recommended to have a secondary LSA on file with the MISO.

Electric Distribution Company Contact Types

General Contact	Individual who is authorized to make decisions on behalf of your entity, including submitting and signing any legal documentation or submitting Change of Information documentation. This individual should also be able to route any MISO inquiries to the appropriate subject matter experts within your entity.
Secondary Contact	This individual may receive inquiries from MISO in the event the General Contact is unavailable. Individual is authorized to submit and sign any legal documentation or Change of Information documentation if the General Contact is unavailable.
Technical Contact	Point of contact for any technical questions related to connectivity, systems, or data.
Local Security Administrator (Primary) **Cannot be added/removed using this tool*	Individual that performs the Local Security Administrator (LSA) role has the ability to establish and manage the access of the employees of their entity to all or part of the information available in MISO Market Systems. Each LBA is responsible for identifying an individual(s) to perform the LSA function, as the user account maintenance is the responsibility of the LBA, not MISO.
Local Security Administrator (Secondary) **Cannot be added/removed using this tool*	Serves as a secondary point of contact in the event that the Primary LSA contact is unavailable. It is highly recommended to have a secondary LSA on file with the MISO.