Customer Inquiry, Dispute & Information (CIDI)

User Guide
Version 2.0
## Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
<th>By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>04/26/10</td>
<td>CIDI initial user guide</td>
<td>Latisha Collins</td>
</tr>
<tr>
<td>1.1</td>
<td>04/27/10</td>
<td>Final Edits</td>
<td>Nathan Hall</td>
</tr>
<tr>
<td>1.2</td>
<td>6/12/17</td>
<td>Update to Settlement dispute section</td>
<td>Meghna Khatri</td>
</tr>
<tr>
<td>1.3</td>
<td>8/28/17</td>
<td>Updated with current screenshots and relevant information</td>
<td>Lindsey Larson</td>
</tr>
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<td>1.4</td>
<td>11/08/17</td>
<td>Updated with current screenshots and relevant information</td>
<td>Mark Richardson</td>
</tr>
<tr>
<td>1.5</td>
<td>11/28/18</td>
<td>Updated for Communities</td>
<td>Mark Richardson</td>
</tr>
<tr>
<td>1.6</td>
<td>10/19/20</td>
<td>Updated document to include the new Case Record Type info for “Negotiated Rate Application”</td>
<td>Monica M.</td>
</tr>
<tr>
<td>1.7</td>
<td>12/04/20</td>
<td>Added clarification under the Negotiated Rate Application submission section.</td>
<td>Monica M.</td>
</tr>
<tr>
<td>1.8</td>
<td>01/06/21</td>
<td>“Hydro DEB” inquiries are different from the “NDEB Application” requests and must be submitted under the “Inquiry Ticket” Record Type.</td>
<td>Monica M.</td>
</tr>
<tr>
<td>1.9</td>
<td>04/20/21</td>
<td>Updated the section for “Inquiry Ticket” to introduce the new Manual Reference Request radio button in the submission window.</td>
<td>Monica M.</td>
</tr>
<tr>
<td>2.0</td>
<td>07/30/21</td>
<td>Updated a new Case Record Type, titled “Onboarding and Maintenance”. Current and onboarding clients can use this new record type to submit their ongoing obligations (existing clients) and document submissions (upcoming clients).</td>
<td>Monica M.</td>
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<tr>
<td></td>
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<td>Updated contents for the following:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. CIDI Survey</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>2. Provide Client Response button modifications</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Disabling comments function when the status is in “Resolved-Pending Validation” or “Closed”.</td>
<td></td>
</tr>
</tbody>
</table>
# Table of Contents

## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>4</td>
</tr>
<tr>
<td>Inquiry and Dispute Process</td>
<td>4</td>
</tr>
<tr>
<td>Resolution Time</td>
<td>4</td>
</tr>
<tr>
<td>Time Sensitive Cases</td>
<td>4</td>
</tr>
<tr>
<td>Getting Started</td>
<td>4</td>
</tr>
<tr>
<td>Market Participant Portal (MPP)</td>
<td>5</td>
</tr>
<tr>
<td>Communities Home Page</td>
<td>6</td>
</tr>
<tr>
<td>Knowledge Articles</td>
<td>9</td>
</tr>
<tr>
<td>Case Reports and Views</td>
<td>11</td>
</tr>
<tr>
<td>Case Record Types</td>
<td>13</td>
</tr>
<tr>
<td>How to create an “Application Access Request Case (AARC) Submission Form” case</td>
<td>14</td>
</tr>
<tr>
<td>How to create an “Inquiry Ticket” case</td>
<td>16</td>
</tr>
<tr>
<td>How to create a “Settlement Dispute” case</td>
<td>18</td>
</tr>
<tr>
<td>How to create a “Negotiated Rate Application” case</td>
<td>21</td>
</tr>
<tr>
<td>How to create an “Onboarding and Maintenance” case</td>
<td>23</td>
</tr>
<tr>
<td>How to create a “Reliability Coordinator Inquiry” case</td>
<td>26</td>
</tr>
<tr>
<td>Case Functionalities</td>
<td>28</td>
</tr>
<tr>
<td>How to Add Comments</td>
<td>28</td>
</tr>
<tr>
<td>How to Add Attachments</td>
<td>29</td>
</tr>
<tr>
<td>How to Provide Client Responses/Comments</td>
<td>30</td>
</tr>
<tr>
<td>How to complete a CIDI survey</td>
<td>31</td>
</tr>
<tr>
<td>Disabling Comments in a Specific Status</td>
<td>33</td>
</tr>
</tbody>
</table>
Introduction

The Customer Inquiry, Dispute & Information (CIDI) system is used to log and track market inquiries and settlement disputes.

Inquiry and Dispute Process

Resolution Time

The ISO is committed to meeting clients’ expectations regarding the fast resolution of cases. To the extent practical, the ISO endeavors to resolve or update all cases by the Follow-Up date established in the case. Settlement Disputes are processed according to the process and timeline outlined in the Settlements and Billing BPM. If the SC seeks faster attention to their case, they can enter the case directly into CIDI, and follow up with a phone call, thereby ensuring that the ISO team has all of the pertinent information and is aware of the case.

Time Sensitive Cases

If a case requires resolution within a Real Time Market time horizon, the ISO strongly recommends that the SC contact their Client Representative by telephone or contact the Customer Service line at 916-608-7320.

Getting Started

You must have a Scheduling Coordinator ID (SCID) and have a CAISO Multi-Application (CMA) digital certificate installed along with access to the Portal before you can use CIDI.

1. Be sure to install the certificate per the instructions provided to you.
2. If you do not have a certificate and/or do not have access to the portal, then request access through you User Access Administrator (UAA). Once you have access provisioned, you can launch CIDI from the Market Participant Portal home page at https://portal.caiso.com.
3. The Market Participant Portal (MPP) Home page will be displayed with a list of all the applications.
Market Participant Portal (MPP)

The Market Participant Portal adds value to Market Participant businesses by streamlining access to secure ISO applications and business-critical information, enabling more efficient participation with the ISO by having:

- Centralized access to ISO applications
- Single log-on to applications using digital certificates
- Centralized access to public information sources of frequent use
Communities Home Page

From the Home page, you can submit a new case, view recent cases, view knowledge articles, view system operating messages, or search the knowledge and existing cases databases.
Tabs across the top of a page take you to the Help Center (home page), Knowledge Articles page, Cases page, or allow you to quickly Submit a Case.

Resources links across the bottom of all pages are quick navigation options for other frequently used stakeholder pages. NOTE: If you are in need of technical assistance (e.g. xml trouble), please be sure to use the Technical Support link.

Predictive Search allows users to search knowledge articles and cases by using keywords to return relevant articles. Simply type a keyword in the search bar, review the list of relevant articles, and select an article for more details.
More Search Results are returned by executing a full search. If the predictive search does not provide the article you are looking for, type the keyword and hit enter to execute a full search. The Search Results page allows users to filter results further by Knowledge Articles, Cases, etc.
Knowledge Articles

On the Knowledge landing page users can search articles by keyword, view by category, view featured articles, and view articles that are trending.

![Knowledge articles](image)

**Browse by category**

- Market Solution
- Settlements and Metering
- Bidding and Scheduling
- Application Access
- OASIS and CMRI
- Resource Adequacy
- General

**Featured**

Do I need to contact the ISO Credit Team if I want to Increase my Letter of Credit?

**Trending**

1. Resource Adequacy (RA) Replacement and Substitution
2. ADS – accepting NASP schedules can limit FMM awards
3. Net Qualifying Capacity (NQC) Request upload and details
4. CRR and Convergence Bidding - Frequently Asked Questions
5. Prices in settlement statements differ from prices in OASIS for certain Scheduling Points?

**Resources**

- Technical support
- Developer information for APIs and application access. Login required.
- Daily Briefing
- Notices about ISO operations, markets, and other activities.
- Market Participant Portal
- Centralized, single sign-on access to applications and data.
- Calendar
- Find upcoming and past meetings and events, and related documents.
Selecting a Category will provide all articles related to that topic.

Resource Adequacy articles
- Credit Allocation on 2018 Monthly RA Showings
- Eligible CPM capacity
- Error (time elapsed) when submitting annual RA showings or Supply Plan within CIRA
- How does a participant find units that have non-RA available to perform a substitution?
- How does a resource get listed on the ‘Other’ tab of the Net Qualifying Capacity (NQC) list?
- Load Serving Entities Bidding Into CSP
- Net Qualifying Capacity (NQC) Request upload and details
- Net Qualifying Capacity (NQC) Request upload and details
- NQC List – Internal and Import Resources
- Off-Peak Opportunity Resource Adequacy Maintenance Outage
- Resource Adequacy (RA) Replacement
- Resource Adequacy (RA) Replacement and Substitution
- Unable to view or submit a Planned Outage Substitution

Selecting an Article allows you to review the content as well as related articles on the topic. Be sure to use the thumbs up or thumbs down feature to let us know if the article was helpful or not.
Case Reports and Views

The Cases page is where users are able to view existing inquiry or a settlement disputes via dashboards and views.

**Dashboard Reports** are pre-defined reports grouping case records in a presentable format for quick viewing.

![Dashboard Inquiry Community Dashboard](image)

**View Reports** by selecting the View Report links at the bottom of each chart to review the report details, and edit filters as needed.

![Report Cases In My Queue](image)
Views are pre-defined lists of case records. Users have the ability to select from different views depending on the result set they are looking for. View results will allow users to sort (by selecting the column header) and refine displayed records by keyword searches (Search this list…) text box.
Case Record Types

There are six case *Record Types* for you to select from when creating a new case.

<table>
<thead>
<tr>
<th>Record Types</th>
<th>Description</th>
<th>CIDI User Role in AIM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Access Request Case (AARC) Submission Form</td>
<td>Allow users to submit and attach the Application Access Request Form (AARF), or Secure File Transfer System (SFTP) AARF. This record type is only available to the User Access Administrator (UAA) for the entity’s organization.</td>
<td>EXTERNAL IMS READ-WRITE POC (for AIM)</td>
</tr>
<tr>
<td>Inquiry Ticket</td>
<td>Allow users to submit a request for IMS and Reliability Coordinator inquiries.</td>
<td>EXTERNAL IMS READ-WRITE</td>
</tr>
</tbody>
</table>
| Negotiated Rate Application                       | Allow users to submit requests for the following application types:  
- Major Maintenance Adder Application  
- NDEB Application  
- O&M Adder Application  
- Other                                                                                     | EXTERNAL IMS READ-WRITE                |
| Reliability Coordinator Inquiry                   | Allow Reliability Coordinator (RC) customers to submit RC related inquiries.                                                                                                                                | EXTERNAL IMS READ-WRITE                |
| Settlement Dispute                                | Allow users to submit dispute tickets.                                                                                                                                                                           | EXTERNAL SDS READ-WRITE                |
| Onboarding and Maintenance                        | Allow users to submit a “Request Type” and “Inquiry Type” specific to the SC Onboarding process.                                                                                                              | EXTERNAL IMS READ-WRITE                |
|                                                  | Request (Picklist):  
- Application  
- Ongoing Obligations / Maintenance                                                                                                                   |                                        |
|                                                  | Inquiry Type (Picklist):  
- Banking Change  
- Name, Address, Contact Changes  
- Transfers or End Dates  
- Information Sheets  
- Additional SCID Request  
- Termination  
- Other                                                                                     |                                        |
How to create an “Application Access Request Case (AARC) Submission Form” case

Note: All inquiries requiring action must be entered into the CIDI application.

1. Click **Submit a Case** button in top right corner from any page within the community
2. On the New Case form, select the record type “**Application Access Request Case (AARC) Submission Form**”.
3. Click the **Next** button.

4. The “New Case: Application Access Request Case (AARC) Submission” form will display the following:
5. Enter the following details:
   - **Subject**: Short description of the issue.
   - **Description**: This is a longer description of the case, up to 32,000 characters, and can be used to cut and paste text into the case. Pasting graphics is currently not supported and all graphics should be submitted as attachments.
   - **Email Recipients**: Use this field to enter other users email addresses that you wish to receive ticket status updates. You can enter up to 5 email addresses separated by a comma.

6. Click **Next** to submit case.

7. After the case has been submitted, you will need to upload a copy of the Application Access Request Form (AARF) or the Secure File Transfer System (SFTS AARF). The ISO will manually update the applicable fields in the case based on the information that was provided on the form.

8. You can post additional info on the Comments section and/or upload attachments.

9. For the attachments, users can upload file sizes up to 4.5 MBs. If the file size is larger than 4.5 MBs, please reach out to your Client Representatives or Service Desk (**servicedesk@caiso.com**) to attach the file(s) on your behalf. Be sure to provide us with the applicable CIDI case reference number.
How to create an “Inquiry Ticket” case

Note: All inquiries requiring action must be entered into the CIDI application.

1. Select the “Submit a Case” button in top right corner of any community page.
2. On the New Case form, select the Record Type, “Inquiry Ticket”.
3. Select the Next button.

4. The “New Case: Inquiry Ticket” form will display the following:
5. Enter the following details:
   - **SCID**: Select the applicable Scheduling Coordinator ID.
   - **Functional Environment**: Appropriate environment your issue exists.
   - **Review for Price Correction**: Select this button if your inquiry should go to the price correction team.
   - **Metering Inquiry**: Select this button if your inquiry is meter data related.
   - **Manual Reference Level Change Request**: Select this button if you would like to submit a request to update the gas or fuel-equivalent price used in the Reference Levels as explained in “Attachment O” of the Market Instruments BPM. Requests must be submitted via CIDI by 08:00 AM Pacific Time on the business date the ISO Market is executed. Requests submitted after 08:00 AM Pacific Time will not be processed. This is related to the Commitment cost default energy enhancements (CCDEBE) initiative. For “after-market cost recovery requests”, use this phrase in the subject line when submitting a new inquiry. More details will be available in the Market Instrument BPM at www.caiso.com.
   - **Subject**: Short description of the issue.
   - **Description**: This is a longer description of the case, up to 32,000 characters, and can be used to cut and paste text into the case. Pasting graphics is currently not supported and all graphics should be submitted as attachments.
   - **Trade Date**: If applicable, enter this information if issue is associated to a given unit.
   - **Trade Hour**: Select All Hours or multiple trade hours by Ctrl + Left clicking the applicable hour(s). Your selections will be highlighted.
   - **Resource ID**: If applicable, enter this information if issue is associated to a given unit.
   - **Email Recipients**: Use this field to enter other users email addresses that you wish to receive ticket status updates. You can enter up to 5 email addresses separated by a comma.

6. Click **Next** to submit the case.

7. You can post additional information on the **Comments** section and/or upload attachments.

8. For the attachments, users can upload file sizes up to 4.5 MBs. If the file size is larger than 4.5 MBs, please reach out to your Client Representatives or Service Desk (servicedesk@caiso.com) to attach the file(s) on your behalf. Be sure to provide us with the applicable CIDI case reference number.
How to create a “Settlement Dispute” case

Note: All Settlement disputes must be entered into the CIDI application.

1. Select the “Submit a Case” button in top right corner of any community page.
2. On the New Case form, select the record type “Settlement Dispute”.
3. Select the Next button.

![New Case Form]

Select a Record Type: Settlement Dispute

[Cancel] [Next]
4. The “New Case: Settlement Dispute” form will display the following:
5. Enter the details for the Settlement transaction in dispute - hovering over the icon for instructions, where provided.

- SCID
- Charge Code
- Dispute Amount
- Trade Date (pick from calendar rather than typing the date)
- Trade Hours
- Settlement Run #
- Statement Disputed
- Statement Publication Date (pick from calendar)
- Placeholder Request (if applicable)
- Bill Determinant (representing the root cause of the issue)
- Resource IDs
- Case Reason
- Description (32,000 character limit)
- Related IMS Case (if applicable)

6. Select the “Next” button at the bottom of the form to submit the dispute.

NOTE: Settlement Dispute cases are not editable once submitted. If you wish to make a change to a submitted Settlement Dispute case, submit an IMS case, contact your ISO Client Representative, or send an email to ISODispute@caiso.com with your edits. Material edits, such as the Trade Date being disputed, will be evaluated by the Dispute Team to ensure compliance with the ISO Tariff.
How to create a “Negotiated Rate Application” case

Note: All inquiries requiring action must be entered into the CIDI application.

**Important:**
Please note that the “Hydro DEB” inquiries are different from the “NDEB Application” type requests and must be submitted under the “Inquiry Ticket” Record Type.

1. Click **Submit a Case** button in top right corner from any page within the community.
2. On the New Case form, select the record type “Negotiated Rate Application”.
3. Click the **Next** button.

4. The “New Case: Negotiated Rate Application” form will display the following:
5. Enter the following details:
   - **SCID**: Select the applicable Scheduling Coordinator ID.
   - **Functional Environment**: Appropriate environment your issue exists.
   - **Application Type**: Applicable application.
     - Major Maintenance Adder Application
     - NDEB Application
     - O&M Adder Application
     - Other
   - **Subject**: Short description of the issue.
   - **Description**: This is a longer description of the case, up to 32,000 characters, and can be used to cut and paste text into the case. Pasting graphics is currently not supported and all graphics should be submitted as attachments.
   - **Resource ID**: If applicable, enter this information if the issue is associated to a given unit.
   - **Config ID List**: May be left blank. This field is used for non-MSG resources.
   - **Email Recipients**: Use this field to enter other users email addresses that you wish to receive ticket status updates. You can enter up to 5 email addresses separated by a comma.

6. Click **Next** to submit the case.

7. You can post additional information on the **Comments** section and/or upload attachments.

8. For the attachments, users can upload file sizes up to 4.5 MBs. If the file size is larger than 4.5 MBs, please reach out to your Client Representatives or Service Desk ([servicedesk@caiso.com](mailto:servicedesk@caiso.com)) to attach the file(s) on your behalf. Be sure to provide us with the applicable CIDI case reference number.
How to create an “Onboarding and Maintenance” case

The CAISO published a new document explaining how to submit Scheduling Coordinator, Congestion Revenue Rights, and Convergence Bidding Application documentation as well as Ongoing Obligations and Maintenance information found in Tariff Section 4.

Effective **May 15, 2021**, emails will no longer be accepted and documents will need to be submitted via the Customer Inquiry Dispute and Information (CIDI) application. Also, it is important to use the new naming convention rules in Appendix B or your documents could be rejected and would need to be re-submitted.

To find this document, please go to [http://www.caiso.com/participate/Pages/SchedulingCoordinatorOngoingObligations.aspx](http://www.caiso.com/participate/Pages/SchedulingCoordinatorOngoingObligations.aspx). Look for the document titled ‘How to Submit Documentation for Applications and Ongoing Obligations’.

As a reminder, documentation must be submitted at least 12 business days prior to the effective date to allow for proper processing time. If submitted less than 12 business days prior to the effective date, the document will need to be resubmitted with an updated effective date. Please submit questions CIDI ticket or email **SCRequests@caiso.com**.

Note: All inquiries requiring action must be entered into the CIDI application.

1. Click **Submit a Case** button in top right corner from any page within the community
2. On the New Case form, select the record type **“Onboarding and Maintenance”**.
3. Click the **Next** button.
4. The “New Case: Onboarding and Maintenance” form will display the following:

```
New Case: Onboarding and Maintenance

SCID

* Request Type - Please select one
  Applications

* Inquiry Type - Please select one
  Banking Change

* Subject

* Description

Resource ID

Email Recipients
```

5. Enter the following details:
   - **SCID**: Select the applicable Scheduling Coordinator ID.
   - **Request Type** (Required): Select “Applications” or “Ongoing Obligations / Maintenance”.
   - **Inquiry Type** (Required): There are 5 options. Please select one from the list.

```
Banking Change
Name, Address, Contact Changes
Transfers or End Dates
Information Sheets
Additional SCID Request
Termination
Other
```
• **Subject** (Required): Short description of the issue.

• **Description** (Required): This is a longer description of the case, up to 32,000 characters, and can be used to cut and paste text into the case. Pasting graphics is currently not supported and all graphics should be submitted as attachments.

• **Resource ID** (Optional): If applicable, enter this information if the issue/request is associated to a given unit.

• **Email Recipient** (Optional): Use this field to enter other users email addresses that you wish to receive ticket status updates. You can enter up to 5 email addresses separated by a comma.

6. Click **Next** to submit the case.

7. You can post additional info on the **Comments** section and/or upload attachments.

8. For the attachments, users can upload file sizes up to 4.5 MBs. If the file size is larger than 4.5 MBs, please reach out to your Client Representatives or Service Desk at [ServiceDesk@caiso.com](mailto:ServiceDesk@caiso.com) to attach the file(s) on your behalf. Be sure to provide the applicable CIDI case reference number.
How to create a “Reliability Coordinator Inquiry” case

Note: All inquiries requiring action must be entered into the CIDI application.

1. Click **Submit a Case** button in top right corner from any page within the community.
2. On the New Case form, select the record type “**Reliability Coordinator Inquiry**”.
3. Click the **Next** button.

4. The “New Case: Reliability Coordinator” form will display the following:
5. Enter the following details:
   - **Reliability Coordinator ID**: Select the applicable Scheduling Coordinator ID.
   - **Functional Environment**: Appropriate environment your issue exists.
   - **RC Category**: Select the applicable category.
   - **Subject**: Short description of the issue.
   - **Description**: This is a longer description of the case, up to 32,000 characters, and can be used to cut and paste text into the case. Pasting graphics is currently not supported and all graphics should be submitted as attachments.
   - **Email Recipients**: Use this field to enter other users email addresses that you wish to receive ticket status updates. You can enter up to 5 email addresses separated by a comma.

6. Click **Next** to submit the case.

7. You can post additional info on the Comments section and/or upload attachments.

8. For the attachments, users can upload file sizes up to 4.5 MBs. If the file size is larger than 4.5 MBs, please reach out to your Client Representatives or Service Desk at ServiceDesk@caiso.com to attach the file(s) on your behalf. Be sure to provide the applicable CIDI case reference number.
Case Functionalities

How to Add Comments

When reviewing an existing case, users can add comments or view any previously submitted comments.

1. Scroll down to the Case Comments section near the bottom of the page.
2. To add a comment, click “Add Comment” button in top right corner.

3. Type in your comment and click Save.
How to Add Attachments

When reviewing an existing case, users can add attachments or view any previous attachments that were submitted.

1. Scroll down to the Attachments section at the bottom of the page.

2. Users can upload attachments by selecting the Upload Files button or simply dragging and dropping a file onto the Upload Files box. NOTE: Only 1 file can be attached at a time.

3. To attach your file, select the Attach to Case button. The below confirmation will display upon successful upload; click Ok.

4. Successfully uploaded files will display below the “Attach to Case” button with the “View” button displayed next to each attachment.
How to Provide Client Responses/Comments

There are three (3) ways to provide a response/comments to a case.

Participants can:

1. Provide a response when the state is in a “Awaiting Client Response” state.

   **New enhancement:**
   - The color of the “Provide Client Response” button will be changed to blue to make it more visible.
   - The button will be moved to the Comments section located towards the bottom of the page.
   - Users cannot add a comment without clicking on the “Provide Client Response” button first.
   - Once the user clicks on the “Provide Client Response” button, the following tasks will occur:
     - The case status will be updated to “Assigned”.
     - The case will be populated in the respective Client Representatives CIDI queue.
   - After the user has clicked on the “Provide Client Response” button, the same button will change back into an “Add Comment” button. Users can add additional comments thereafter.

2. Provide a response when the status is in a “Resolved-Pending Resolution” state and they have to click “Accept/Decline Resolution.

3. Provide a comment when the status is in an “Assigned” state.

**Important:**
- The “Response” section under the Accept/Decline Resolution window is a freeform text field with a 255-character limitation.
- The “comments” section is a freeform text field with a 4000-character limitation.
How to complete a CIDI survey

CIDI users can complete a CIDI survey when the following conditions are met:

- The status is in the “Resolved-Pending Validation” state.
- The participant has clicked on the “Accept/Decline Resolution” and selects the “Accept Resolution” option.

Note: The CIDI survey will not be available to complete if you select the “Decline Resolution” option.

Once these conditions have been met, the “Accept/Decline Resolution” screen will display additional contents containing the two (2) questionnaires.

1) Did the resolution answer your inquiry? [Note: You can rate the resolution on a scale of 1-5. ‘5’ being the Most Satisfied.]

2) Was the resolution provided in a timely manner? [Note: You can select “Yes” or “No” to indicate if the resolution was provided in a timely manner.]
Important:

- The survey questionnaire is available for all Case Record Types (i.e. Inquiry Tickets, Reliability Coordinator Inquiry, Onboarding and Maintenance, Negotiated Rate Application) except for Application Access Request Case (AARC) and Settlement Dispute.
- Participants can only complete the survey questionnaire when the status is in a “Resolved-Pending Validation” state.
- The CIDI survey is not available to complete if the participant selects the “Decline Resolution”.
- Once the status is in a “Closed” state, the participant will not be able to complete a survey.
- The survey responses are only for internal tracking to help us improve our process.
- The survey questionnaire is optional. It is an opportunity for participants to provide their feedback on the ticket resolution.
Disabling Comments in a Specific Statuses

There is a gap in the CIDI process when the case status is in “Resolved-Pending Validation”. CIDI users can enter a comment after the case has been set to “Resolved-Pending Validation” or “Closed”. As a result, the case status is left unchanged; therefore, the proper channels are not aware of the new comments, which can delay the resolution. Users can still create a new ticket to report the issue or click on the “Provide Client Response” button and select “Decline Resolution” so that the case can be routed back for further review.

This new enhancement will prevent users from submitting a comment when the status is in the “Resolved-Pending Resolution” or “Closed” state.