



CIDI Enhancement Training – Dispute Comments, Turning Inquiry Tickets into Disputes, and Predictive Search

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Housekeeping



Make sure to keep yourself muted unless you have a question



If you have a question, you may either ask over the phone or in the chat



If you want to ask a question, you can virtually “raise your hand” in WebEx

Agenda

In this training, we will:

- Review the changes to the menu tabs/buttons on the CIDI community page
- Discuss the new process for turning inquiry tickets into dispute tickets
- Learn about the new process for requesting a call with a CAISO dispute analyst when a dispute ticket has been closed
- Look at the new predictive search feature in CIDI that appears when you create an inquiry ticket
- Review what your next steps are before these CIDI enhancements are put into production



First Things First...

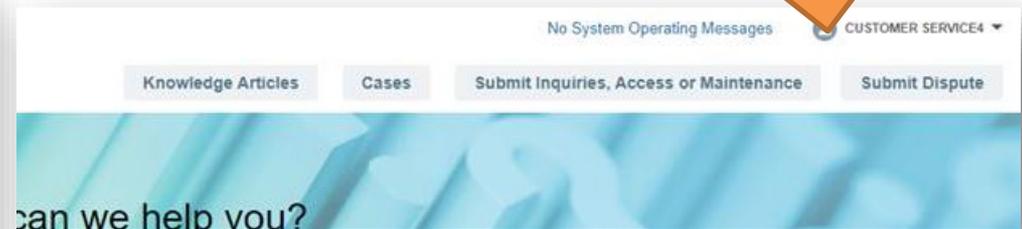
- These enhancement requests originated from the Customer Service Survey feedback that we received from you.
- These new enhancements will be implemented into production on **November 30, 2021**.



MENU TABS UPDATE

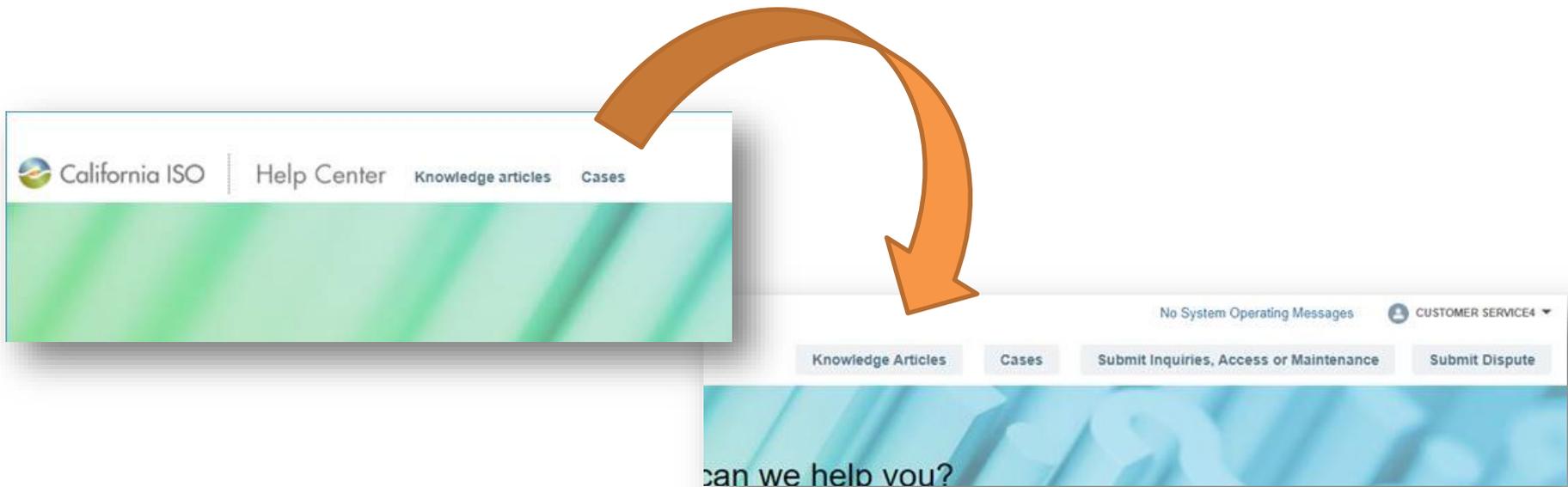
Menu Tabs Update #1

- The **Submit a Case** button on the CIDI community page has been expanded to two different buttons:
 - Submit Inquiries, Access or Maintenance
 - Submit Dispute



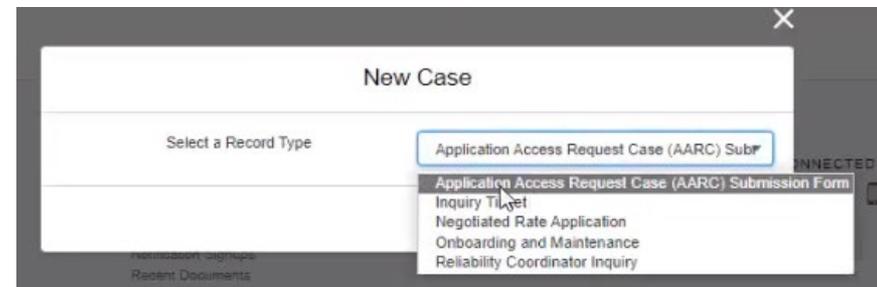
Menu Tabs Update #2

- The **Knowledge Articles** and **Cases** buttons on the CIDI community page have been moved from the left side of the screen to the right side.



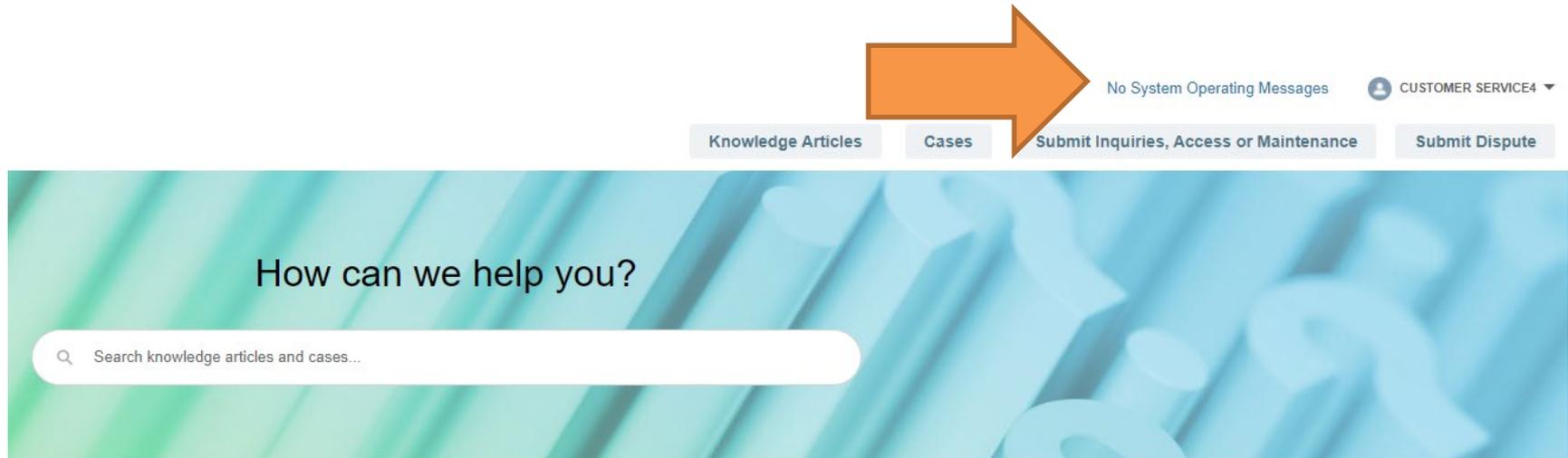
Menu Tabs Changes

- Record Type Changes:
 - The Settlement Dispute record type is now a separate tab/button called **Submit Dispute**.
 - The **Submit Inquiries, Access or Maintenance** button will consist of all of the other the case record types:
 - Application Access Request Case (AARC) Submission
 - Inquiry Ticket
 - Negotiated Rate Application
 - Onboarding and Maintenance
 - Reliability Coordinator Inquiry



! Reminder !

You can view any upcoming scheduled maintenance for CAISO applications by clicking on the **System Operating Messages** link for *Production* maintenances.



The screenshot shows the top navigation bar of the CAISO website. It includes a search bar with the placeholder text "Search knowledge articles and cases...". To the right of the search bar are four navigation links: "Knowledge Articles", "Cases", "Submit Inquiries, Access or Maintenance", and "Submit Dispute". An orange arrow points to the "Submit Inquiries, Access or Maintenance" link. Above the navigation bar, the text "No System Operating Messages" and a user profile "CUSTOMER SERVICE4" are visible. Below the navigation bar is a large blue banner with the text "How can we help you?" and a search bar.

icles

Recently viewed cases

on's Test Article

00239221 Meter Data Access

TURNING INQUIRY TICKETS INTO DISPUTES

Poll Question



Have you ever submitted an inquiry ticket to the California ISO that needed to be turned into a dispute ticket?

- A. That has definitely happened!
- B. Once or twice...maybe.
- C. Not that I can think of.
- D. I'm not really sure how to submit tickets yet.

Inquiry Tickets into Disputes Overview

- **Purpose:** This enhancement will allow the Customer Experience team to give market participants the ability to generate a dispute ticket from an inquiry ticket on a cases by case basis.



Current Inquiry Tickets into Disputes Process

Customer creates inquiry ticket.

Customer Representative and Customer determines it should be dispute ticket.

Customer Representative closes Inquiry ticket.

Customer Representative informs customer via ticket comments to create dispute ticket.

Customer submits new dispute ticket and must manually copy over all information from original ticket.
Information is not transferred to new ticket

New Inquiry Tickets into Disputes Process

Customer creates inquiry ticket.

Customer Representative and Customer reviews/works ticket and determines it should be a dispute ticket.

Customer Rep enables option for “Create a Dispute Case from this Inquiry Case” button and closes inquiry ticket.

Customer receives notification that inquiry ticket is closed.

Customer goes into CIDI to create dispute case using “Create a Dispute Case from this Inquiry Case” button **Information is automatically copied over to new ticket.**

Inquiry Tickets into Disputes Process – Step #1

The original inquiry ticket is closed with a comment from the Customer Service Representative requesting the customer turn the ticket into a dispute ticket. The customer will receive an email with the ticket resolution stating that they will need to submit a dispute ticket. This will be the indicator for the customer to go to the respective inquiry ticket to generate a dispute ticket.



Inquiry Tickets into Disputes Process – Step #2

Open the inquiry ticket and select the **Create a Dispute Case from this Inquiry Case** button.

CIDI Cases

239151

Case
10/06/21 Testing Please ignore (Turn IMS to Dispute) [Printable View](#)

Status: Assigned Case Number: 00239151

Create a Dispute Case from this Inquiry Case

Case Information

Review for Price Correction

Metering Inquiry

Case Number: 00239151 Status: Assigned

Functional Environment: Production Account Name: California ISO

If you do not have access to submit dispute tickets, you will receive an error when clicking the button.

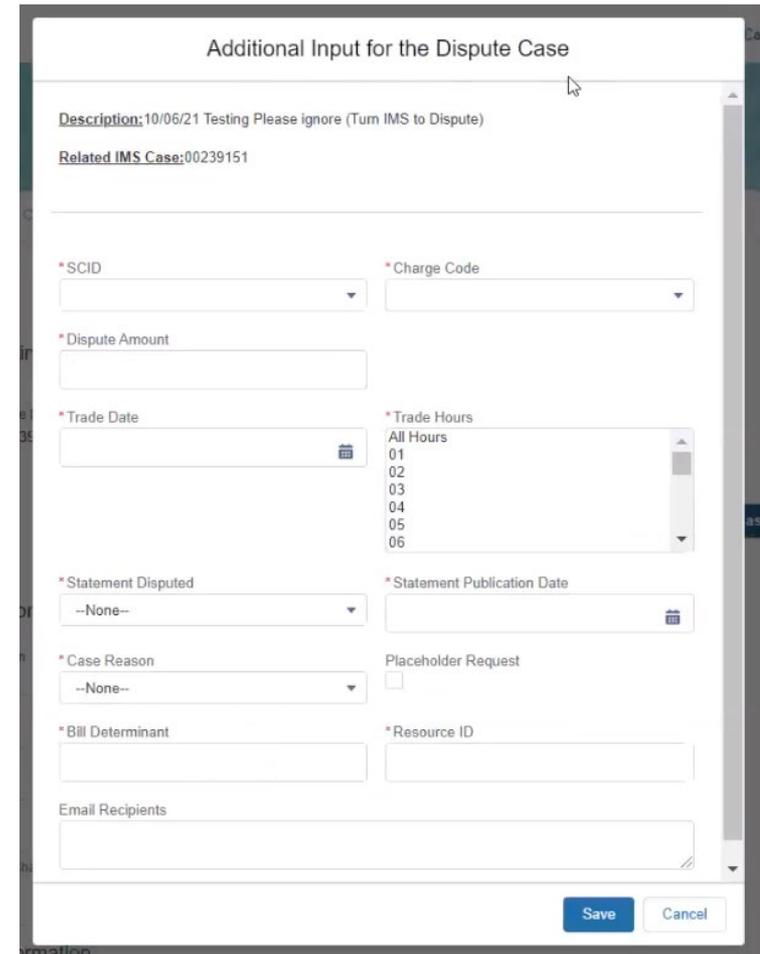
Access to Submit Dispute Tickets

- If you do not have access to submit dispute tickets and need to convert the inquiry ticket into a dispute ticket, you have two options:
 - Work with another person in your organization who *does* have access to submit dispute ticket.
 - Work with your UAA to get access to submit dispute tickets in CIDI (assigned via AIM).

Inquiry Tickets into Disputes Process – Step #3

You will receive a pop-up to enter additional information about your dispute ticket. Enter all required information and then click **Save**.

Note: this process may take a few seconds.



The screenshot shows a web form titled "Additional Input for the Dispute Case". At the top, it displays "Description: 10/06/21 Testing Please ignore (Turn IMS to Dispute)" and "Related IMS Case: 00239151". The form contains several input fields and dropdown menus:

- * SCID: A dropdown menu.
- * Charge Code: A dropdown menu.
- * Dispute Amount: A text input field.
- * Trade Date: A date picker.
- * Trade Hours: A dropdown menu with options: All Hours, 01, 02, 03, 04, 05, 06.
- * Statement Disputed: A dropdown menu with "--None--".
- * Statement Publication Date: A date picker.
- * Case Reason: A dropdown menu with "--None--".
- Placeholder Request: A checkbox.
- * Bill Determinant: A text input field.
- * Resource ID: A text input field.
- Email Recipients: A text input field.

At the bottom right, there are "Save" and "Cancel" buttons.

Dispute Ticket Information Errors

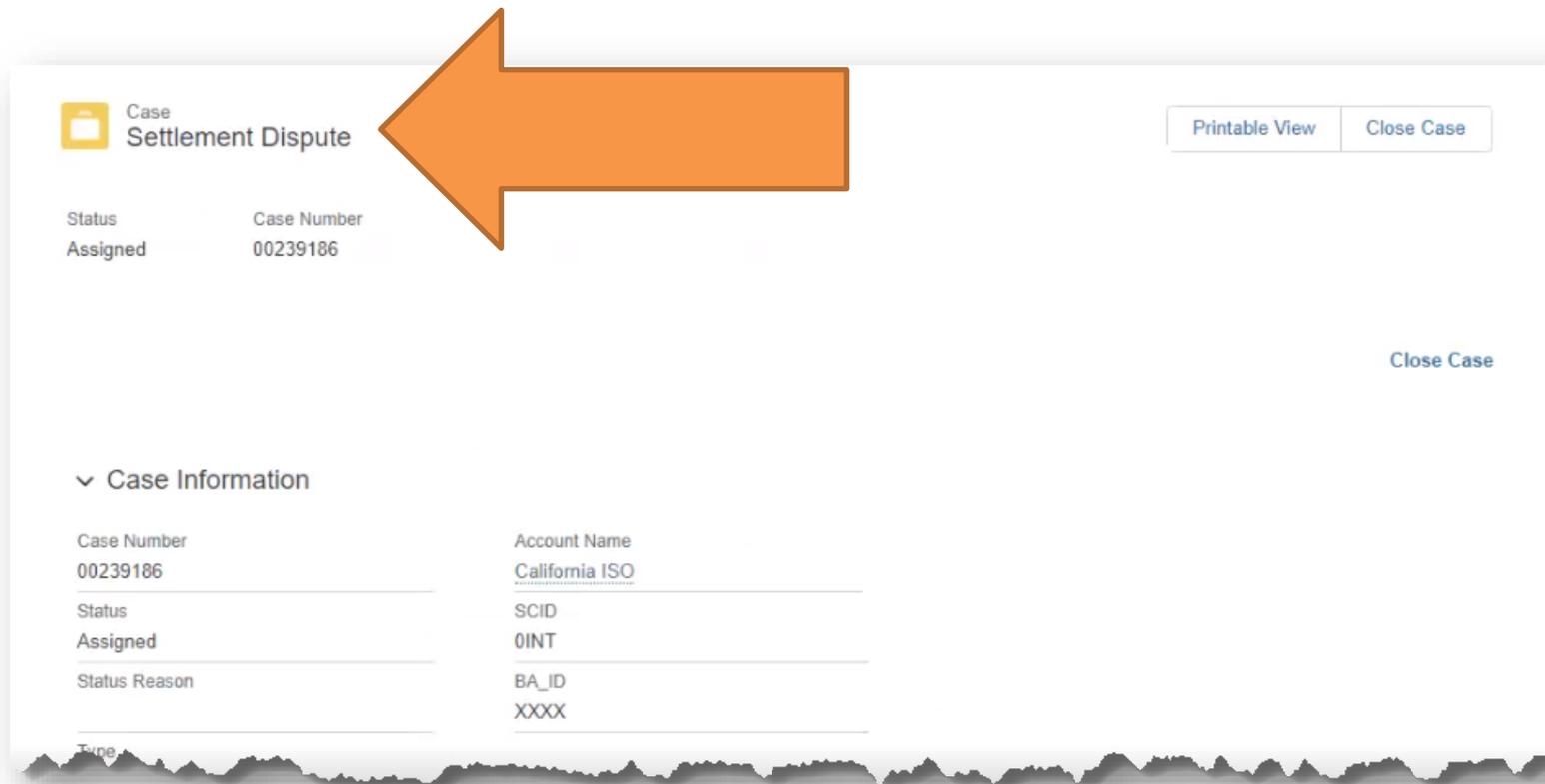
If you skip any required fields when submitting the dispute ticket, you will receive an error.

The screenshot shows a web form titled "Additional Input for the Dispute Case". At the top, a red error banner reads: "Error: Trade Hours: Please contact your client rep to set a trade hour". Below the banner, the form contains the following fields:

- Description:** 10/06/21 Testing Please ignore (Turn IMS to Dispute)
- Related IMS Case:** 00239151
- * SCID:** 0INT
- * Charge Code:** 1302
- * Dispute Amount:** 1.00
- * Trade Date:** Nov 2, 2021
- * Trade Hours:** All Hours (with a list of options: 01, 02, 03, 04, 05, 06)

Inquiry Tickets into Disputes Process – Step #4

The dispute case has now been created and all information from the original inquiry ticket has been copied over.

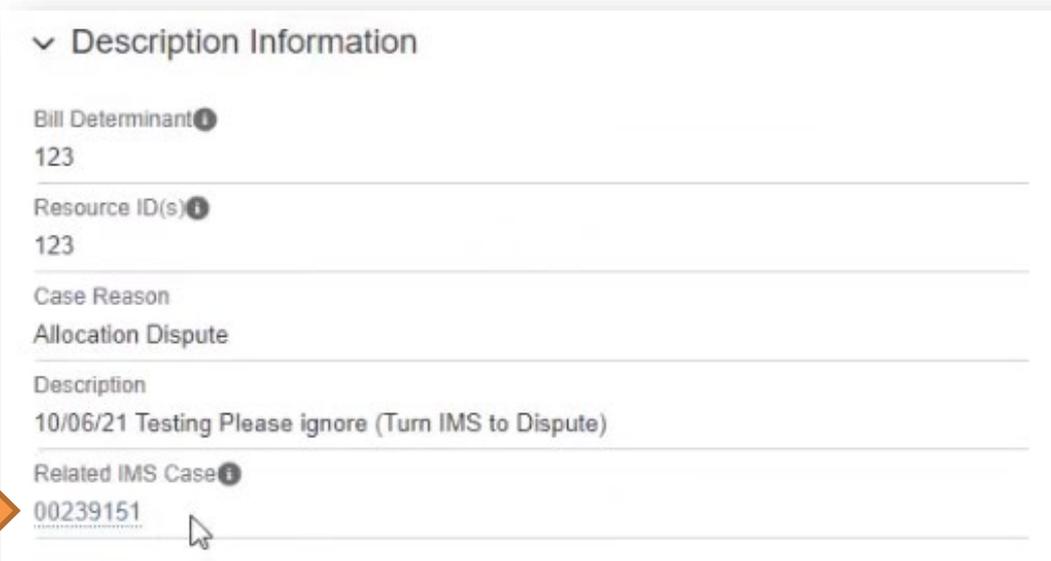


The screenshot shows a web interface for a 'Case Settlement Dispute'. At the top left, there is a yellow folder icon and the text 'Case Settlement Dispute'. To the right of this are two buttons: 'Printable View' and 'Close Case'. Below the title, the status is 'Assigned' and the case number is '00239186'. A large orange arrow points from the right towards the 'Case Settlement Dispute' title. At the bottom right of the interface, there is another 'Close Case' button. Below the status information, there is a section titled 'Case Information' with a dropdown arrow. This section contains a table of case details:

Case Information	
Case Number	Account Name
00239186	California ISO
Status	SCID
Assigned	0INT
Status Reason	BA_ID
	XXXX
Type	

Inquiry Tickets into Disputes Process – Step #5

The associated inquiry ticket (IMS case) number will be listed in the “Description Information” section of the dispute ticket in the new **Related IMS Case** field.



▼ Description Information

Bill Determinant ⓘ
123

Resource ID(s) ⓘ
123

Case Reason
Allocation Dispute

Description
10/06/21 Testing Please ignore (Turn IMS to Dispute)

Related IMS Case ⓘ
00239151

Other Important Items to Note

- The “Create a Dispute Case from this Inquiry Case” button will **NOT** show unless a Customer Representative initiates the process.
 - Customers will not be able to see the button until then.
- Anything that is included in the original inquiry ticket is transferred over to the new dispute ticket. This includes:
 - Comments
 - Attachments
 - Other data on the ticket
- Anything added after the inquiry ticket is closed is **NOT** transferred over to the dispute ticket.

Other Important Items to Note

- Customers have **10 business days** to create the dispute ticket
 - After 10 days, the “Create a Dispute Case from this Inquiry Case” button will no longer be able to be selected
 - Please follow the dispute submission window deadline located on the California ISO Payments Calendar
 - Note: If you select the “Create a dispute Case” button after the dispute submission window deadline has passed, you will receive an error message
- Customers will still need to complete the current process of closing out the inquiry ticket.
 - i.e. accepting the resolution of the case



Questions

COMMENT ENHANCEMENTS FOR DISPUTES

Poll Question



Have you ever wanted to talk to a California ISO Dispute Analyst about a dispute ticket that was closed?

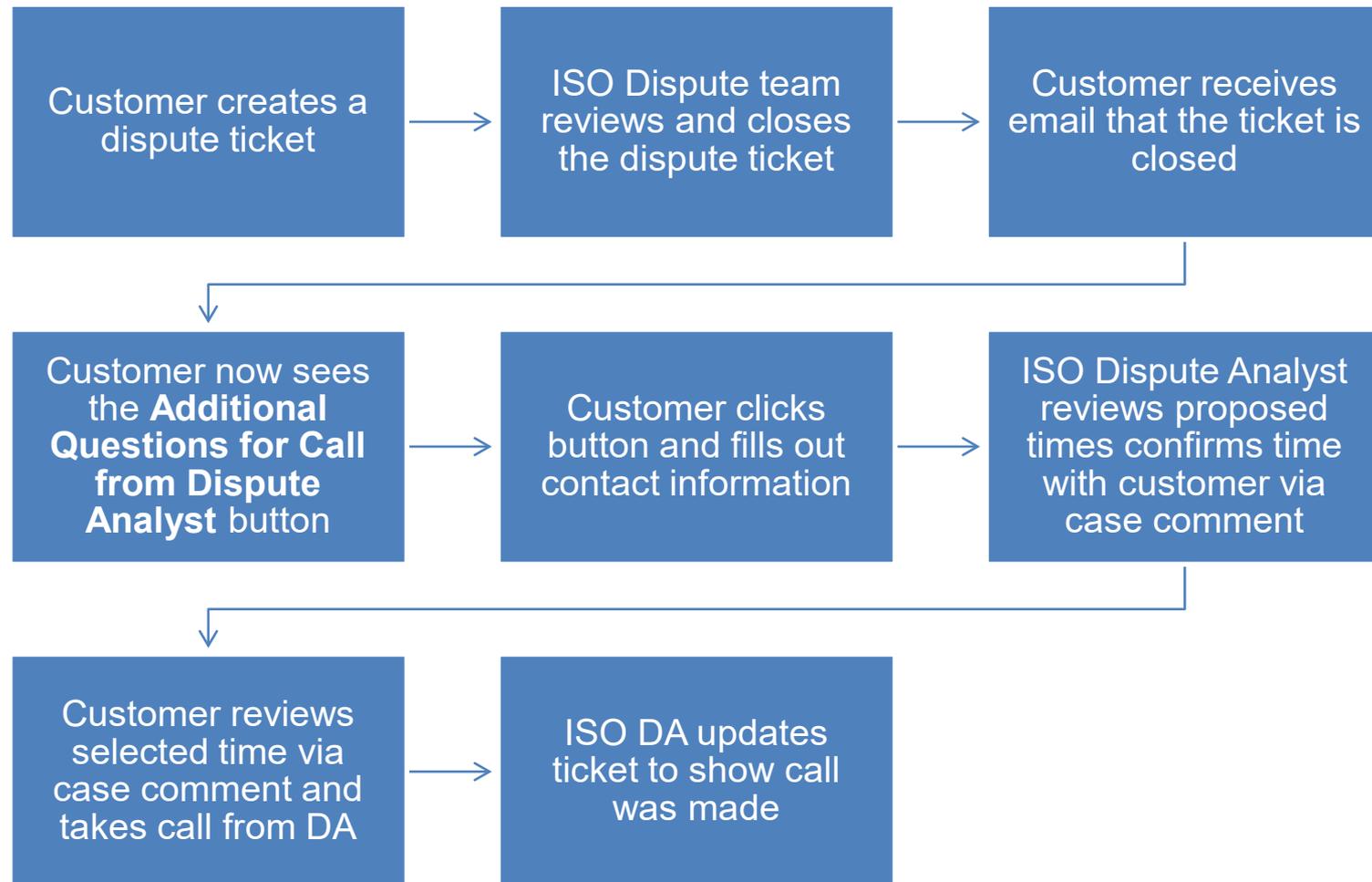
- A. Definitely!
- B. On occasion.
- C. No, I've never needed to talk to anyone.
- D. I've never had to submit a dispute ticket.

Dispute Comments Overview

- Currently, market participants are unable to submit dispute comments once the dispute submission window has closed.
 - They also do not have the ability to communicate with a Dispute Analyst outside of the dispute forum.
- **Purpose:** This enhancement will give market participants the opportunity reach out to a Dispute Analyst with questions once a dispute ticket is closed.
- AIM Access Role:
 - External [EXTERNAL SDS READ-WRITE]



New Dispute Comments Process



Dispute Comments Process – Step #1

The **Additional Questions for Call from the Dispute Analyst** button will display after the dispute is closed.



Dispute Comments Process – Step #2

A window will appear and all four fields in the **Additional Questions for Call from the Dispute Analyst** will need to be completed before clicking the **Save** button.

Additional Questions for Call from the Dispute Analyst

* Dispute Call Phone Number
916-608-7320

* Dispute Call: First Proposed Date/Time
Date: Nov 8, 2021 Time: 08:00 AM

Dispute Call: Additional Proposed Dates/Times
11/09/21 - 09:00 AM
11/09/21 - 10:00 AM
11/10/21 - 11:00 AM

* Dispute Call Questions
Need clarification on xxx because xxx.

Save Cancel

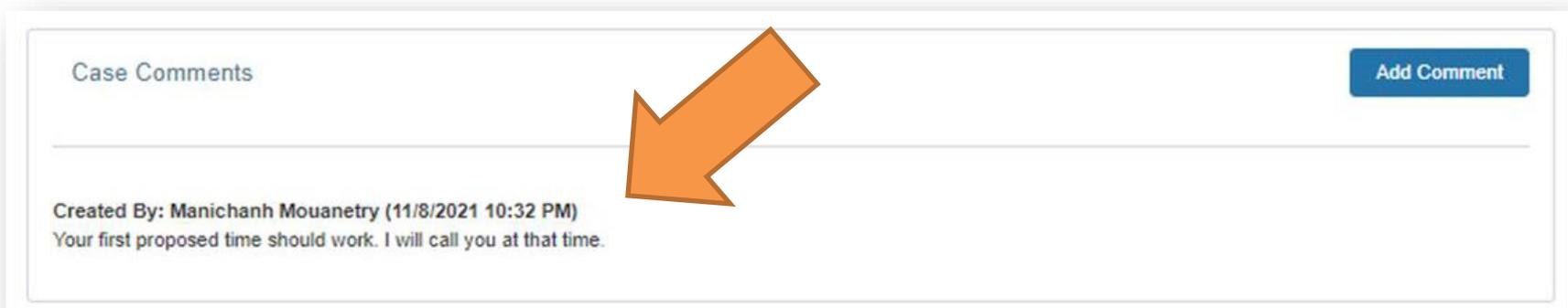
Dispute Comments Process – Step #3

An email notification will be sent to both the Case Owner and the Responsible Owner of the dispute.



Dispute Comments Process – Step #3

The Dispute Analyst will notify the customer via case comment of the agreed upon call time.

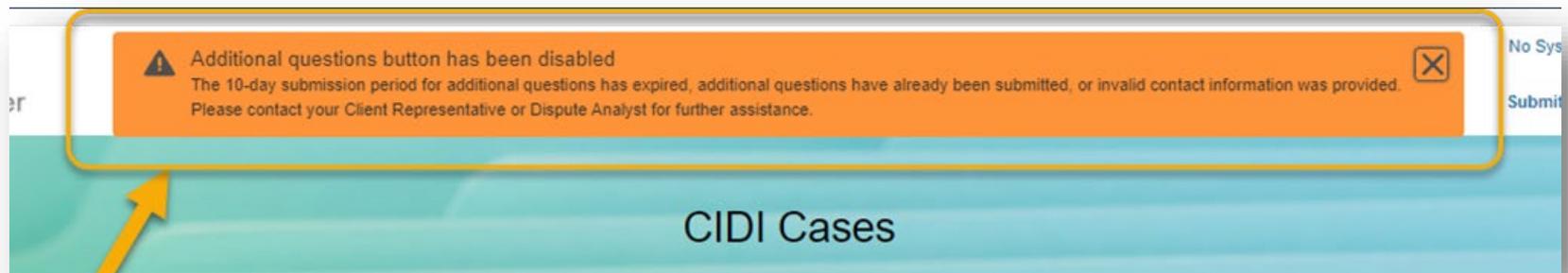


The screenshot shows a 'Case Comments' section. On the right side, there is a blue button labeled 'Add Comment'. Below the header, there is a horizontal line. Underneath the line, the text reads: 'Created By: Manichanh Mouanetry (11/8/2021 10:32 PM)' followed by 'Your first proposed time should work. I will call you at that time.' A large orange arrow points from the 'Add Comment' button area towards the comment text.

Note: the submitter/owner will receive an email that a new comment was added to the dispute ticket.

Other Important Notes about Dispute Comments

- Once the **Additional Questions for Call from the Dispute Analyst** button is clicked, it will be disabled.
 - It will still appear on the external community page but will be greyed out.
 - Any further clicking of the button will display the following message:



Other Important Notes for Dispute Comments

- The **Additional Questions for Call from the Dispute Analyst** button will remain active for 10 business days after the dispute case is closed
 - After 10 business days, this button will be grayed out to indicate the expired status.
- If a customer provides **incorrect contact info or dates** or is not available at the agreed call time, the ISO Dispute Analyst will mark the contact request as “Invalid/Incorrect Information provided for call request” and add notes to the case comments.
 - You will have to find an alternate arrangement to get in contact with the ISO Dispute Analyst (i.e. inquiry ticket or Client Representative)

Questions

PREDICTIVE SEARCH

Poll Question



Have you ever submitted an inquiry ticket to the California ISO and then realized the information you were looking for was available in a knowledge article in CIDI?

- A. Yes, I can remember a specific time!
- B. It's possible, but I can't think of a time off-hand.
- C. Hmmmm...not really.
- D. What are knowledge articles?

Predictive Search Overview

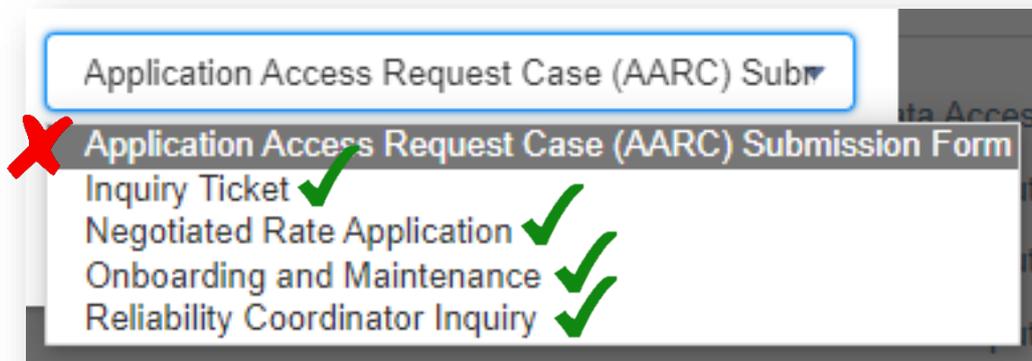
Purpose: allows users to view a list of related knowledge articles based on the information entered in the entry to the Subject or Description fields when users create a new CIDI ticket.



Predictive Search Overview

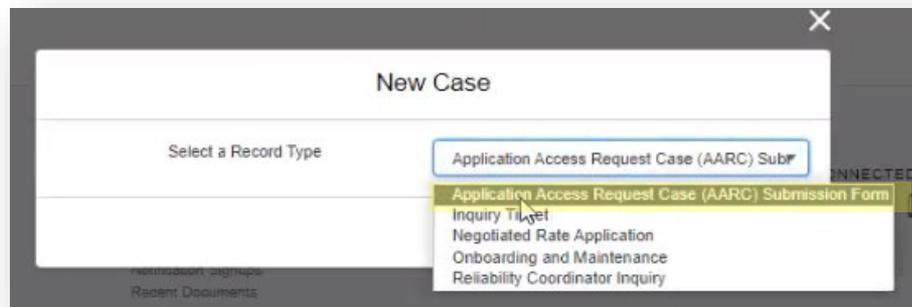
The predictive search functionality is **only** available for the following case record types:

- Inquiry Ticket
- Negotiated Rate Application
- Onboarding and Maintenance
- Reliability Coordinator Ticket



! Reminder !

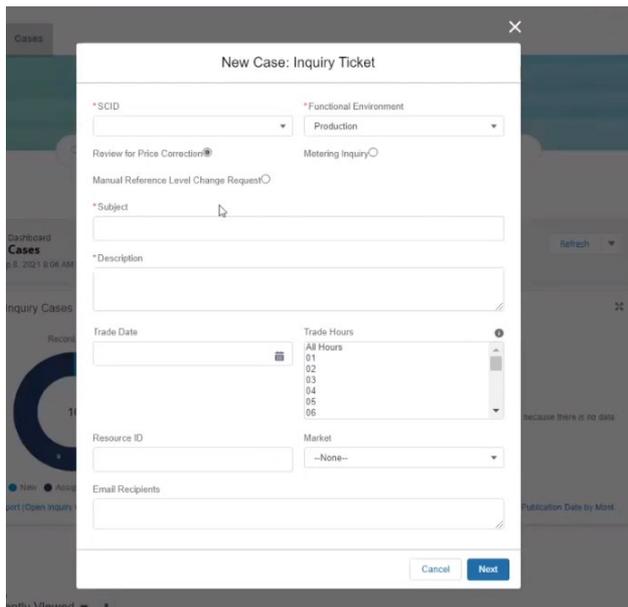
- The **Application Access Request Case (AARC)** Submission record type is **not** used for inquiry tickets.
- This record type should **only** used for submitting access requests for :
 - TR (Transmission Register)
 - RMR (Reliability Must-Run) Discussion Board
 - SFTP (Secure File Transfer Protocol)



Changes to Ticket Window

When opening new tickets, the interface has changed from a pop-up window to a full screen.

Current

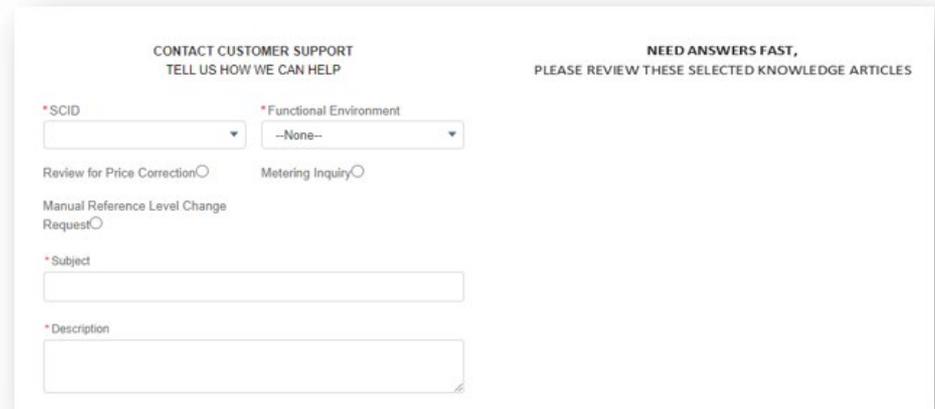


The screenshot shows a 'New Case: Inquiry Ticket' pop-up window. The form includes the following fields and options:

- *SCID (dropdown menu)
- *Functional Environment (dropdown menu, currently set to 'Production')
- Review for Price Correction (radio button, selected)
- Manual Reference Level Change Request (radio button)
- Metering Inquiry (radio button)
- *Subject (text input field)
- *Description (text input field)
- Trade Date (text input field)
- Trade Hours (dropdown menu, currently set to 'All Hours')
- Resource ID (text input field)
- Market (dropdown menu, currently set to '--None--')
- Email Recipients (text input field)

Buttons for 'Cancel' and 'Next' are located at the bottom right of the form.

New



The screenshot shows the 'New' ticket creation interface as a full-screen page. The form includes the following fields and options:

- CONTACT CUSTOMER SUPPORT TELL US HOW WE CAN HELP
- NEED ANSWERS FAST, PLEASE REVIEW THESE SELECTED KNOWLEDGE ARTICLES
- *SCID (dropdown menu)
- *Functional Environment (dropdown menu, currently set to '--None--')
- Review for Price Correction (radio button)
- Manual Reference Level Change Request (radio button)
- Metering Inquiry (radio button)
- *Subject (text input field)
- *Description (text input field)

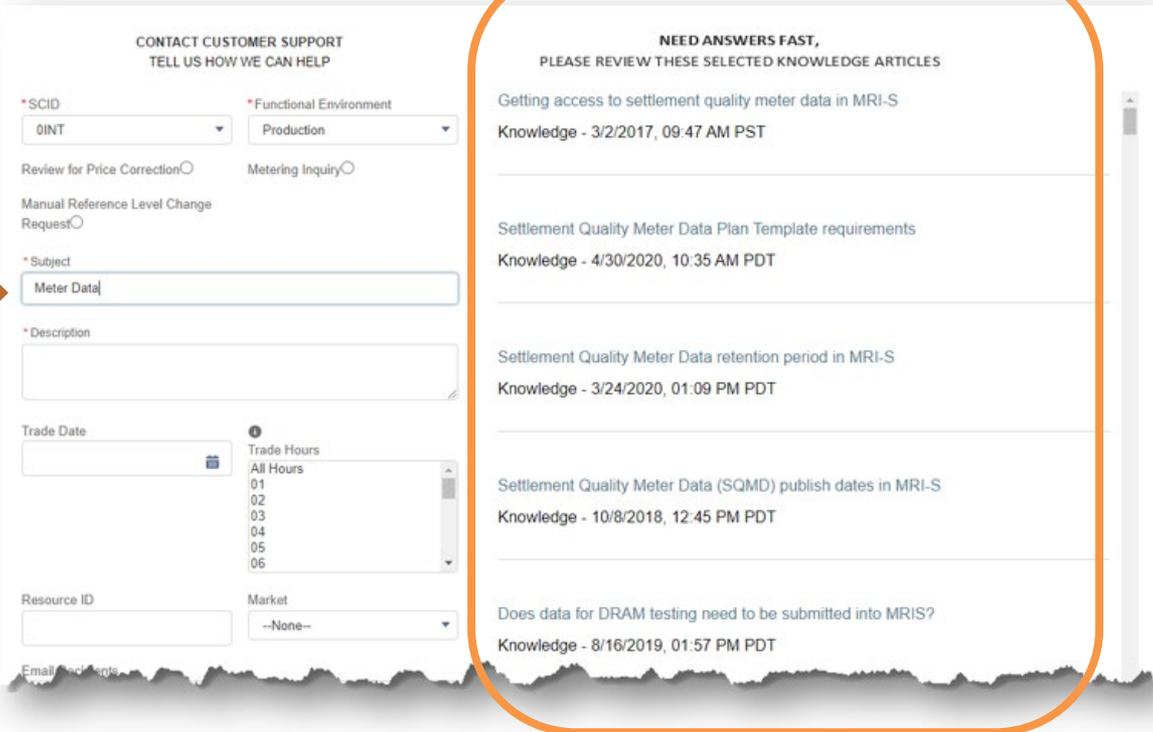
Predictive Search Launchpad

After opening one of the included ticket types, a new predictive search launchpad area will show on the right-hand side.

The screenshot displays a customer support interface. On the left, there is a form titled "CONTACT CUSTOMER SUPPORT TELL US HOW WE CAN HELP". The form includes several fields: a dropdown for "SCID", a dropdown for "Functional Environment" (currently set to "--None--"), radio buttons for "Review for Price Correction", "Manual Reference Level Change Request", and "Metering Inquiry", a text input for "Subject", and a larger text input for "Description". At the bottom of the form, there are fields for "Trade Date" and "Trade Hours". On the right, a rounded rectangular area is highlighted with an orange border. This area is titled "NEED ANSWERS FAST, PLEASE REVIEW THESE SELECTED KNOWLEDGE ARTICLES".

Predictive Search Results from Subject

Type in a keyword or phrase into the **Subject** field and a list of available knowledge articles will populate.



The screenshot displays a customer support interface. On the left, there is a form with the following fields and options:

- CONTACT CUSTOMER SUPPORT**
TELL US HOW WE CAN HELP
- * SCID: 0INT
- * Functional Environment: Production
- Review for Price Correction
- Metering Inquiry
- Manual Reference Level Change Request
- * Subject: Meter Data
- * Description: (empty)
- Trade Date: (empty)
- Trade Hours: All Hours, 01, 02, 03, 04, 05, 06
- Resource ID: (empty)
- Market: --None--
- Email (partial):

An orange arrow points from the 'Subject' field to the search results. The search results are displayed in a rounded rectangle on the right side of the interface:

NEED ANSWERS FAST,
PLEASE REVIEW THESE SELECTED KNOWLEDGE ARTICLES

- Getting access to settlement quality meter data in MRI-S
Knowledge - 3/2/2017, 09:47 AM PST
- Settlement Quality Meter Data Plan Template requirements
Knowledge - 4/30/2020, 10:35 AM PDT
- Settlement Quality Meter Data retention period in MRI-S
Knowledge - 3/24/2020, 01:09 PM PDT
- Settlement Quality Meter Data (SQMD) publish dates in MRI-S
Knowledge - 10/8/2018, 12:45 PM PDT
- Does data for DRAM testing need to be submitted into MRIS?
Knowledge - 8/16/2019, 01:57 PM PDT

Predictive Search Results from Description

As you continue to input information in the **Description** field, additional knowledge articles pertaining to your inquiry will populate.

The screenshot shows a customer support interface. On the left, there is a form titled "CONTACT CUSTOMER SUPPORT TELL US HOW WE CAN HELP". The form includes fields for "SCID" (0INT), "Functional Environment" (Production), "Subject" (Meter Data), and "Description" (Dispute on). There are also checkboxes for "Review for Price Correction", "Manual Reference Level Change Request", "Metering Inquiry", and "Trade Date". Below the "Description" field, there is a "Trade Hours" dropdown menu showing options from 01 to 06. At the bottom, there are fields for "Resource ID", "Market" (set to --None--), and "Email Recipients".

On the right side of the form, there is a section titled "NEED ANSWERS FAST, PLEASE REVIEW THESE SELECTED KNOWLEDGE ARTICLES". This section displays a list of knowledge articles with their titles and timestamps:

- SCID Error During Dispute Submission
Knowledge - 11/22/2017, 09:27 AM PST
- Unable to log into the Customer Information Dispute Inquiry (CID) application
Knowledge - 6/9/2020, 11:53 AM PDT
- How does a resource get listed on the 'Other' tab of the Net Qualifying Capacity (NQC) list?
Knowledge - 4/21/2020, 01:12 PM PDT
- What does the designation, "SCID XPUB," denote within CID?
Knowledge - 11/22/2019, 09:06 AM PST
- What is the maximum allowable attachment size within CID?
Knowledge - 7/15/2020, 04:55 PM PDT

An orange arrow points from the "Description" field to the knowledge articles. An orange bracket on the right side of the knowledge articles points to the text "Different results".

Different results

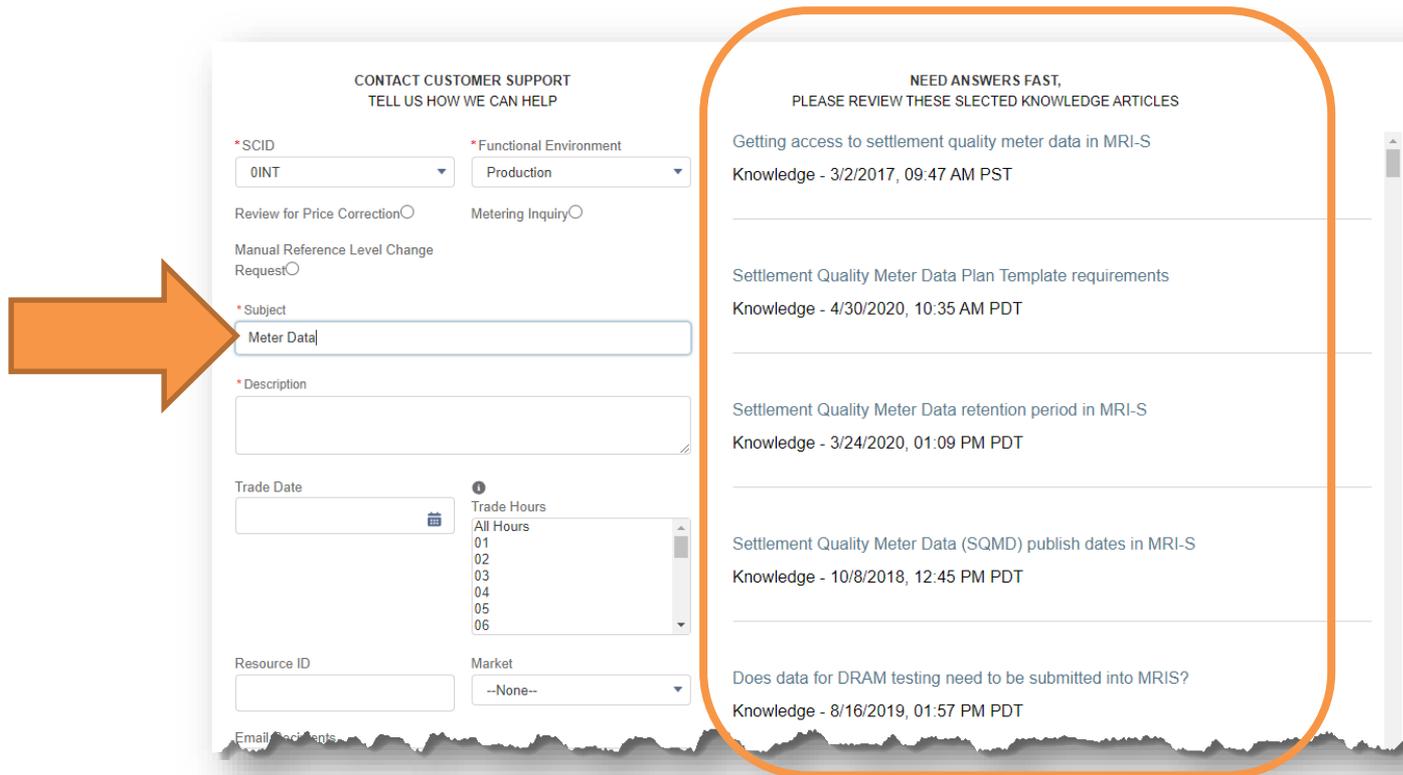
Predictive Search Launchpad

After opening one of the included ticket types, a new predictive search launchpad area will show on the right-hand side.

The image shows a screenshot of a customer support interface. On the left is a form titled "CONTACT CUSTOMER SUPPORT TELL US HOW WE CAN HELP". The form includes several fields: a dropdown for "* SCID", a dropdown for "* Functional Environment" (set to "--None--"), radio buttons for "Review for Price Correction", "Manual Reference Level Change Request", "Metering Inquiry", and "Subject", and a text area for "* Description". At the bottom, there is a "Trade Date" field and a "Trade Hours" dropdown (set to "All Hours"). On the right is a rounded rectangular area with an orange border, titled "NEED ANSWERS FAST, PLEASE REVIEW THESE SLECTED KNOWLEDGE ARTICLES".

Predictive Search Results from Subject

Type in a keyword or phrase into the **Subject** field and a list of available knowledge articles will populate.



CONTACT CUSTOMER SUPPORT
TELL US HOW WE CAN HELP

* SCID
0INT

* Functional Environment
Production

Review for Price Correction Metering Inquiry

Manual Reference Level Change Request

* Subject
Meter Data

* Description

Trade Date

Trade Hours
All Hours
01
02
03
04
05
06

Resource ID

Market
--None--

NEED ANSWERS FAST,
PLEASE REVIEW THESE SLECTED KNOWLEDGE ARTICLES

- Getting access to settlement quality meter data in MRI-S
Knowledge - 3/2/2017, 09:47 AM PST
- Settlement Quality Meter Data Plan Template requirements
Knowledge - 4/30/2020, 10:35 AM PDT
- Settlement Quality Meter Data retention period in MRI-S
Knowledge - 3/24/2020, 01:09 PM PDT
- Settlement Quality Meter Data (SQMD) publish dates in MRI-S
Knowledge - 10/8/2018, 12:45 PM PDT
- Does data for DRAM testing need to be submitted into MRIS?
Knowledge - 8/16/2019, 01:57 PM PDT

Predictive Search Results from Description

As you continue to input information in the Description field, additional knowledge articles pertaining to your inquiry will populate.

The screenshot displays a customer support interface. On the left, a form titled "CONTACT CUSTOMER SUPPORT TELL US HOW WE CAN HELP" contains several input fields: "SCID" (dropdown menu with "OINT" selected), "Functional Environment" (dropdown menu with "Production" selected), "Subject" (text input with "Meter Data"), and "Description" (text input with "Dispute on"). There are also radio buttons for "Review for Price Correction", "Manual Reference Level Change Request", "Metering Inquiry", and "Trade Date". A calendar icon is next to the "Trade Date" field. Below the "Description" field is a "Trade Hours" dropdown menu with options "All Hours", "01", "02", "03", "04", "05", and "06". At the bottom of the form are fields for "Resource ID", "Market" (dropdown menu with "--None--" selected), and "Email Recipients".

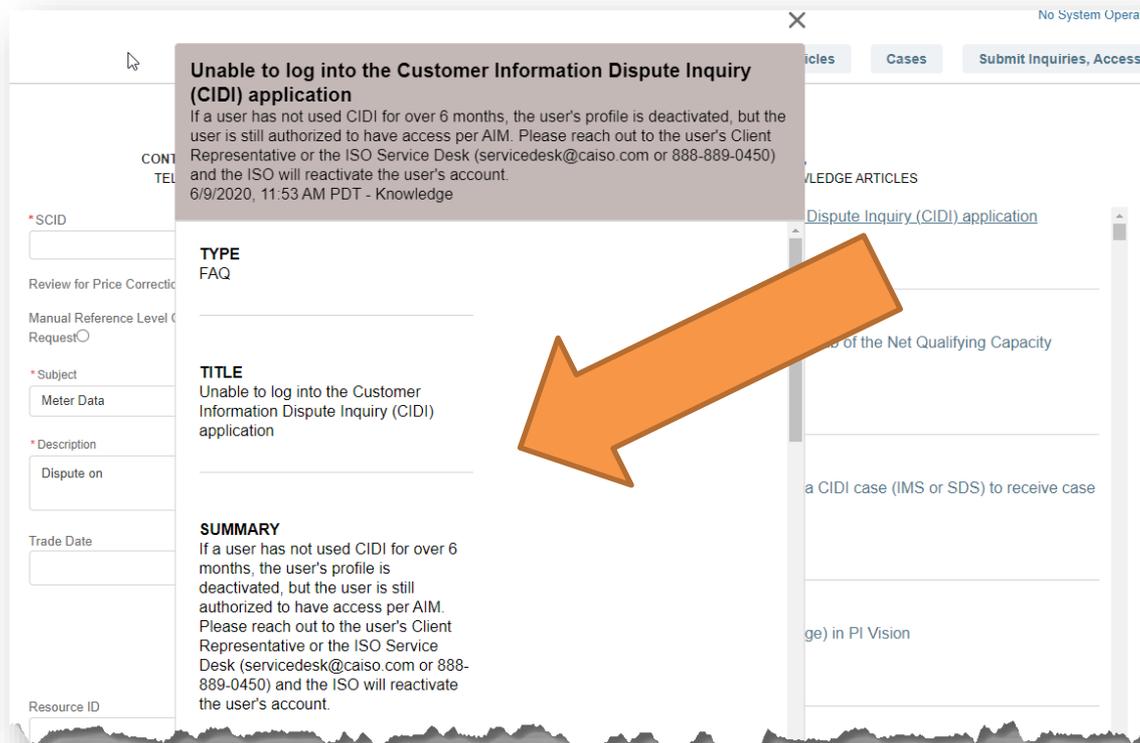
On the right, a section titled "NEED ANSWERS FAST, PLEASE REVIEW THESE SLECTED KNOWLEDGE ARTICLES" lists several knowledge articles:

- SCID Error During Dispute Submission
Knowledge - 11/22/2017, 09:27 AM PST
- Unable to log into the Customer Information Dispute Inquiry (CIDI) application
Knowledge - 6/9/2020, 11:53 AM PDT
- How does a resource get listed on the 'Other' tab of the Net Qualifying Capacity (NQC) list?
Knowledge - 4/21/2020, 01:12 PM PDT
- What does the designation, "SCID XPUB," denote within CIDI?
Knowledge - 11/22/2019, 09:06 AM PST
- What is the maximum allowable attachment size within CIDI?
Knowledge - 7/15/2020, 04:55 PM PDT

An orange arrow points to the "Description" field. An orange bracket on the right groups the knowledge articles, with the text "Different results" written next to it.

Viewing a Knowledge Article

To view a knowledge article result, click on the name of the article. A new window will populate with the information.



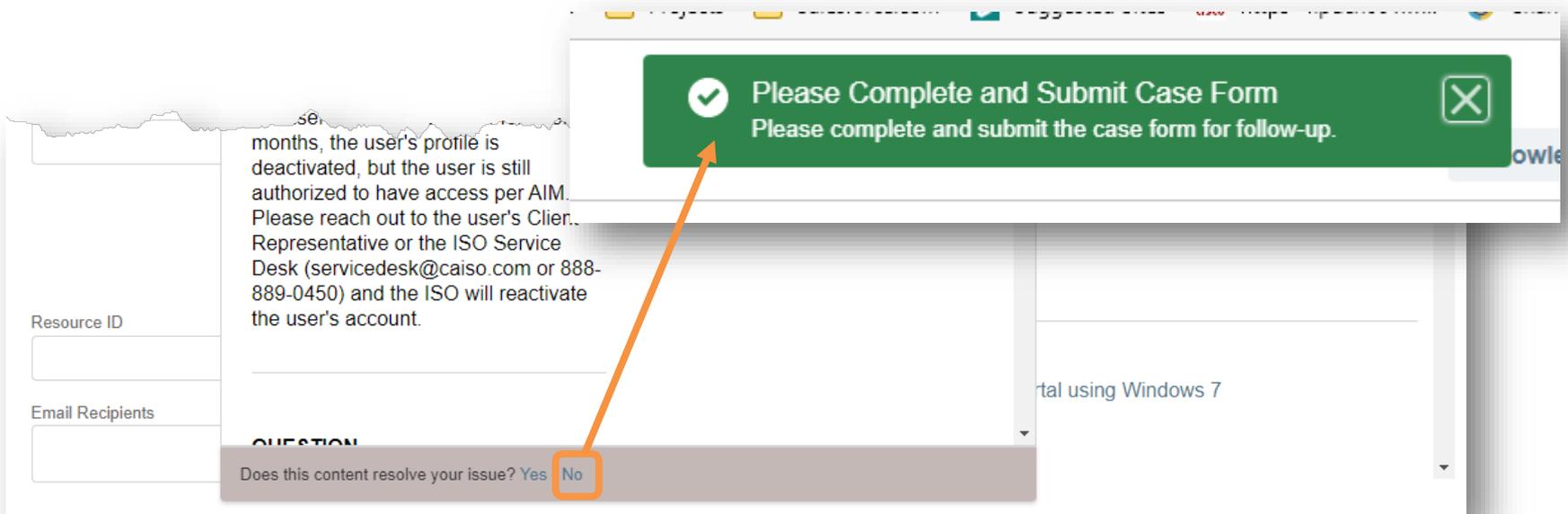
Finding an Answer - Yes

If you find the answer to your inquiry from the list of knowledge articles, select **Yes** at the bottom of the knowledge article to cancel the ticket and return to the CIDI community home page.

The screenshot shows a user interface for finding answers. At the top, a search bar asks "How can we help you?" with the placeholder text "Search knowledge articles and cases...". Below the search bar, a knowledge article is displayed. The article text reads: "months, the user's profile is deactivated, but the user is still authorized to have access per AIM. Please reach out to the user's Client Representative or the ISO Service Desk (servicedesk@caiso.com or 888-889-0450) and the ISO will reactivate the user's account." Below the article text, there is a question: "Does this content resolve your issue?" with two radio buttons, "Yes" and "No". The "Yes" button is highlighted with an orange square. To the left of the article, there are input fields for "Resource ID" and "Email Recipients".

Finding an Answer - No

If you did NOT find an answer to your inquiry from the list of knowledge articles, select **No** at the bottom of the knowledge article. You will receive a pop-up asking you to complete and submit the ticket.



The screenshot shows a web interface for a knowledge article. On the left, there are input fields for 'Resource ID' and 'Email Recipients'. The main content area contains text about a user's profile being deactivated. At the bottom of the article, there is a question: 'Does this content resolve your issue? Yes No'. The 'No' button is highlighted with an orange square. An orange arrow points from this 'No' button to a green pop-up notification box that says: 'Please Complete and Submit Case Form Please complete and submit the case form for follow-up.' The pop-up also features a checkmark icon and a close button (X).

Additional Information about Predictive Search

- There are 400+ knowledge articles in CIDI.
 - If you have an idea to a knowledge article, email your Customer Service Representative.
- The knowledge articles will populate based keyword or phrases entered from the active subject or description field.
 - All other fields will not populate different responses.
- The knowledge article list on the right panel will populate up to a maximum of 20 knowledge articles.
 - There is no scrollbar for additional articles.

Questions

So What Do You Need to Do Next?

Ensure that everyone from your organization who submits CIDI tickets is aware of these changes

- PPT and training recording will be placed on CAISO.com learning center by tomorrow

Ensure that anyone who will need to manage dispute tickets has the correct access in AIM

- AIM role: External [EXTERNAL SDS READ-WRITE]

Be prepared for the following changes to CIDI starting tomorrow:

- Predictive search functionality
- New dispute buttons:
 - Create a Dispute Case from this Inquiry Case
 - Additional Questions for Call from the Dispute Analyst



Final Questions

FAQ

Where can I find this presentation?

The presentation slides and recording will be posted after today's training on our Learning Center <http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>.

Where can I find the CIDI User Guide?

The Customer Inquiry Dispute Information (CIDI) user is currently posted on the Application Access page under the PARTICIPATE tab at <http://www.caiso.com/participate/Pages/ApplicationAccess/Default.aspx>. The updated changes will be added to the CIDI User Guide by COB day, 12/1/21.

How can I find out who my Client Representatives are?

You can send an email to ISOClientRepresentatives@caiso.com, submit an inquiry through the [Contact Us](#) page at www.caiso.com, or call the Customer Services Main Line at 916-608-7320.

How do I know which Dispute Analyst to contact when requesting for a call?

Each dispute ticket is assigned to a Dispute Analyst. Once a request for a call with a Dispute Analyst comes through CIDI, a notification will be sent to that analyst along with the dispute details that were provided by the customer. Please try to provide as much details in the request so that the Dispute Analyst can be better prepared for the call.

FAQ (Con't)

If you submit an Inquiry ticket that is later determined should be submitted as a dispute, is the date of the dispute the date of the inquiry ticket or the date of the dispute ticket?

Please use the trade dates(s) of the actual dispute issue.

If I submit an Inquiry ticket prior to the deadline, do we use the trade date of the dispute or is the date of the dispute when the ticket is converted from an issue to a dispute?

Please use the trade dates(s) of the actual dispute issue.

If the inquiry ticket was not responded to within the dispute window timeframe, can we still convert the inquiry ticket into a dispute ticket?

Please contact your Client Representatives and they will be able to provide guidance.



Please take time to fill out our training evaluation!

For more detailed information on anything presented, please visit our website at:

www.caiso.com

Or submit a ticket to your customer service representative