CIDI Enhancement Training - Customer Survey and Provide Client Response Button

Rashele Wiltzius
Customer Readiness Manager
August 5, 2021

The information contained in these materials is provided for general information only and does not constitute legal or regulatory advice. The ultimate responsibility for complying with the ISO FERC Tariff and other applicable laws, rules or regulations lies with you. In no event shall the ISO or its employees be liable to you or anyone else for any decision made or action taken in reliance on the information in these materials.
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 three CIDI Enhancements that will be implemented by the CAISO
- Discuss the new CIDI customer survey and the response options allowed in the survey
- Review the new CIDI feature that automatically changes ticket statuses when comments are added
- Discuss the specific triggers that change a ticket to an “Assigned” status
- Discuss when the Additional Comments button will and will not be available
CIDI CUSTOMER SURVEY QUESTIONNAIRE
Poll Question

Are you interested in being able to provide additional information regarding the resolution of a ticket?

A. Definitely!
B. Hmmmm…that feature *may* be helpful
C. I think I need to hear more.
D. Not really.
Customer Survey Overview

- **Purpose**: to give external customers the ability to rate CAISO’s response to submitted tickets.

- **This enhancement will allow participants to provide their feedback for the following areas:**
  - Satisfaction
  - Timeliness
Survey Ticket Types

• Only applies to certain types of tickets:
  – Inquiry Ticket
  – RC Ticket
  – Onboarding and Maintenance
  – Negotiated Rate Application

• *Not* included:
  – Application Access Request Case Submission
  – Settlement Dispute

Note: the customer selects/designates the ticket type when submitting ticket. If you have selected the incorrect ticket type, contact your customer service representative.
Triggering the Survey

To trigger survey, ticket must be in “Resolved – Pending Validation” status. Click the **Accept/Decline Resolution** button.
Survey Option

The survey only appears when you accept the resolution. If you select decline, the status will be changed back to “Assigned” and the ticket will go back to the CAISO for further review.
Where Is The Survey Located?

The new customer response survey will show below the Response field.
Survey Satisfaction

“Satisfaction” will be rated on a scale of 1-5.

– 1 = Least Satisfied,
– 5 = Most Satisfied
Survey Timeliness

Select a “Yes” or “No” option to indicate if the response was provided in a timely manner.
Additional Survey Comments

Additional comments should go in the corresponding text box. Make sure to click **Save**!
Additional Information About Customer Surveys

• Responding to the survey is NOT required to close a ticket.
  – Note: a response with regards to your acceptance/rejection of the ticket is still required

• You will **not** be able to see your survey responses after they are submitted.

• If you close the ticket and would like to make changes to your survey responses, please contact your customer representative.
Questions
PROVIDE CLIENT RESPONSE BUTTON
Poll Question

Have you ever added information to a ticket awaiting your response and forgot to change the ticket status?

A. No way! I always remember to change the status.
B. I don’t think I have…
C. I’m not really sure, but it’s possible
D. Yup, guilty!
Current Ticket Status Process

- Currently, when a case status is in “Awaiting Client Response”, CIDI users can enter a comment without clicking the “Provide Client Response” button.

- As a result:
  - The case status is left unchanged
  - The CAISO may not be aware of the new comments
Enhancement Change Overview

• Moving forward, when a ticket is in the “Awaiting Client Response” status, customers will only be able to submit a comment by clicking the “Provide Client Response” button.
  – This will automatically change the ticket status to “Assigned”

• This enhancement will:
  – Prevent external users from providing a response or attaching a document and not change the ticket status
  – Ensure that the proper channels are notified of any new updates.
Log into CIDI and view tickets that are awaiting your action.
# Opening a Ticket

Click on the ticket number you would like to respond to.

<table>
<thead>
<tr>
<th>Status</th>
<th>Case Number</th>
<th>Category</th>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Client Response</td>
<td>00236885</td>
<td>-</td>
<td>06/29/21 - &quot;Testing Provide Client Response&quot; function #1</td>
<td>06/29/21 - &quot;Testing Provide Client Response&quot; function #1</td>
</tr>
<tr>
<td></td>
<td>00237273</td>
<td>Reliability Coordinator Inquiry</td>
<td>04/28/21 - Testing - Please ignore</td>
<td>Validating the &quot;Provide Client Response&quot; function #1</td>
</tr>
<tr>
<td></td>
<td>00238818</td>
<td>Reliability Coordinator Inquiry</td>
<td>testing</td>
<td>testing1234567 more tests</td>
</tr>
<tr>
<td></td>
<td>00239868</td>
<td>ADS</td>
<td>ADS Connectivity issue</td>
<td>Phone Number(408)-555-TEST</td>
</tr>
</tbody>
</table>

Contact Name: llaras
Email: llaras@ISO.com
Organization: Other
Comments:Please check
Old Provide Client Response Button

If ticket is in “Awaiting Client response” status, the **Provide Client Response** button will no longer be on the top right.
New Provide Client Response Button

The Provide Client Response button has replaced the “New Comment” button. Users cannot add a comment without clicking on the “Provide Client Response” button first.
New Provide Client Response Button

The Provide Client Response button has been moved to the Comments section and the color has been changed to blue to make it more visible.
Providing a Client Response

Enter any comments in the Request/Response area and click **Save**.
Ticket Status Update

After clicking Save the following tasks will occur:

1. The case status will be updated to “Assigned”.
2. The case will be populated in the respective Client Representatives CIDI queue.
“Add Comments” Button

After the ticket status has been changed, the same button will change back into an “Add Comment” button. Users can add additional comments using this button moving forward.
Save Button Reminder

Remember to click **Save** when entering a new comment!
Attachments

You can attach a document to a ticket either before or after the ticket has been changed to “Awaiting Client Response”.

Select the Upload Files button to select a file to attach, or drag and drop a file from your computer onto the Upload Files button, then select the Attach to Case button to upload the file.

Day 3 EIM Participant Workbook DRAFT.docx

Attach to Case
However, the status of a ticket will be changed from “Awaiting Client Response” to “Assigned” when a document is attached (and a comment will be automatically generated)

Case Comments

Created By: Customer SERVICE4 (8/4/2021 9:02 PM)
File 'Type of RC docx' uploaded by Customer SERVICE4

Created By: Customer SERVICE4 (8/4/2021 8:41 PM)
Here is my response

Created By: Manichanh Mouanetry (6/29/2021 7:27 AM)
Need more info.
Questions
DISABLING COMMENTS IN SPECIFIC STATUES
Current Comment Process for Resolved Tickets

- Currently, CIDI users can enter a comment after the case has been set to “Resolved-Pending Validation” or “Closed”.
- When this happens, the case status is left unchanged which means:
  - The proper channels are not aware of the new comments
  - It can delay the resolution of the ticket
Change to Process for Resolved Tickets

• The comments section will now be disabled when the case status is in a “Resolved-Pending Validation” or “Closed” state

• If comments need to be added to resolved tickets, users should:
  – 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
Final Questions
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