



CIDI Enhancement Training - Customer Survey and Provide Client Response Button

Rashele Wiltzius

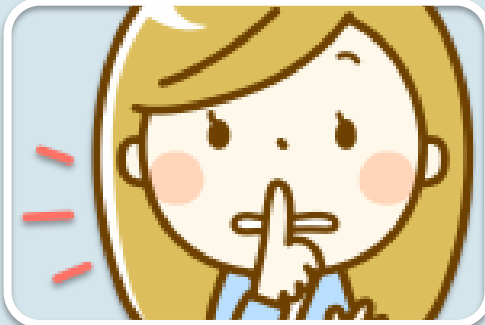
Customer Readiness Manager

August 5, 2021

Updated 8/5/2021

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

- CAISO is enabling the functionality to allow CIDI users to complete a survey for each inquiry ticket once the case status has been set to “Resolved-Pending Validation”.
- **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

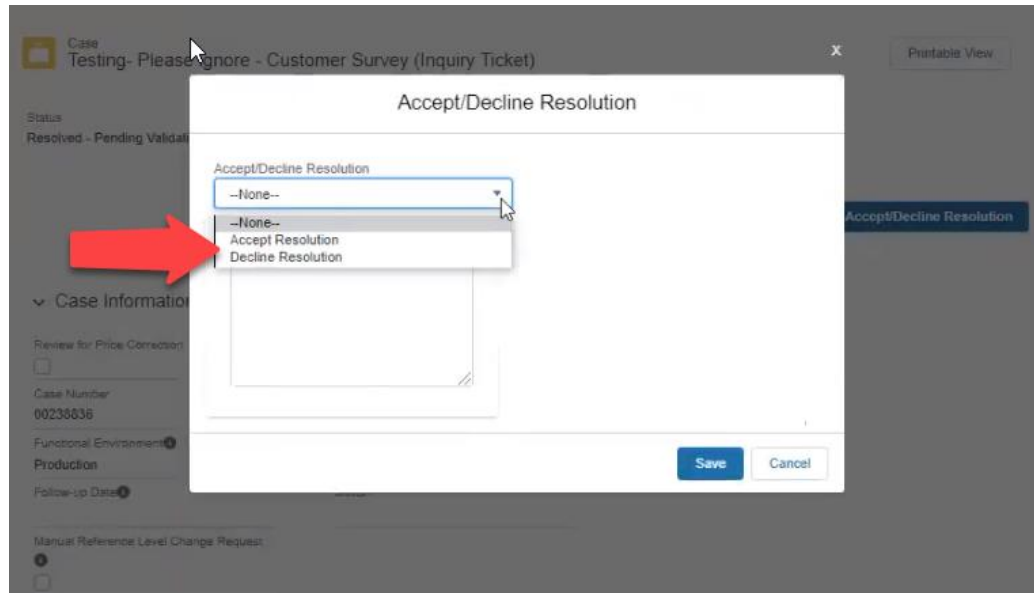
Triggering the Survey

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

The screenshot displays the 'CIDI Cases' interface. At the top, there is a search bar with the placeholder text 'Search knowledge articles and cases...'. Below the search bar, a case is listed with the title 'Case Testing- Please ignore - Customer Survey (Inquiry Ticket)'. To the right of the case title is a 'Printable View' button. The case details show a status of 'Resolved - Pending Validation' (highlighted with a red box) and a case number of '00238836'. A large red arrow points from the status box to a blue button labeled 'Accept/Decline Resolution'. Below the case details, there is a section for 'Case Information' with a dropdown arrow, and two checkboxes: 'Review for Price Correction' and 'Metering Inquiry'.

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



Accept/Decline Resolution

Accept/Decline Resolution
Accept Resolution

* Response

In an ongoing effort to improve the quality and timeliness of our CIDI resolutions, the CAISO requests you to provide responses to the questions below. Thank you for your participation.

Did the resolution answer your inquiry?
5 - Most Satisfied

Was the resolution provided in a timely manner?
Yes

Additional Comments

Save Cancel

Survey Satisfaction

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

- 1 = Least Satisfied,
- 5 = Most Satisfied

Did the resolution answer your inquiry?

5 - Most Satisfied

5 - Most Satisfied

4 - Very Satisfied

3 - Satisfied

2 - Not Very Satisfied

1 - Least Satisfied

Survey Timeliness

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

Was the resolution provided in a timely manner?

Yes

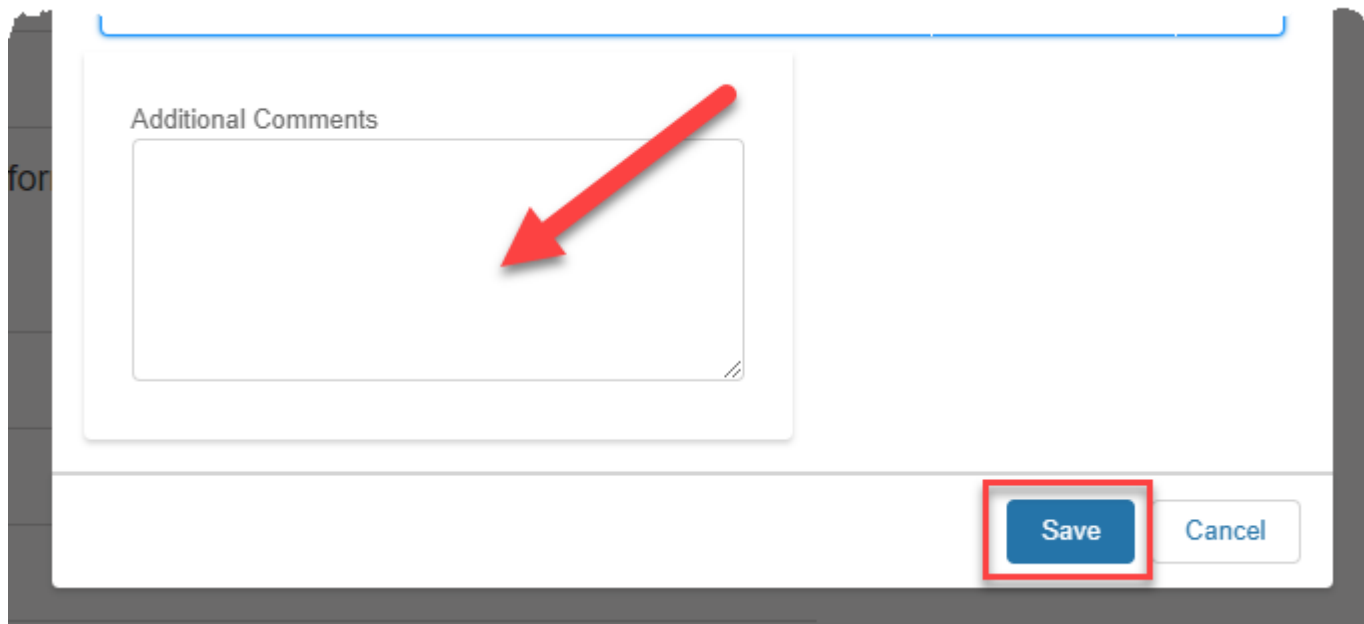
Yes

No

Additional Comments

Additional Survey Comments

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



The screenshot shows a web form interface. On the left, the word "for" is partially visible. The main form area contains a text box labeled "Additional Comments" with a red arrow pointing to it. Below the text box, there are two buttons: a blue "Save" button and a white "Cancel" button. The "Save" button is highlighted with a red rectangular border.

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

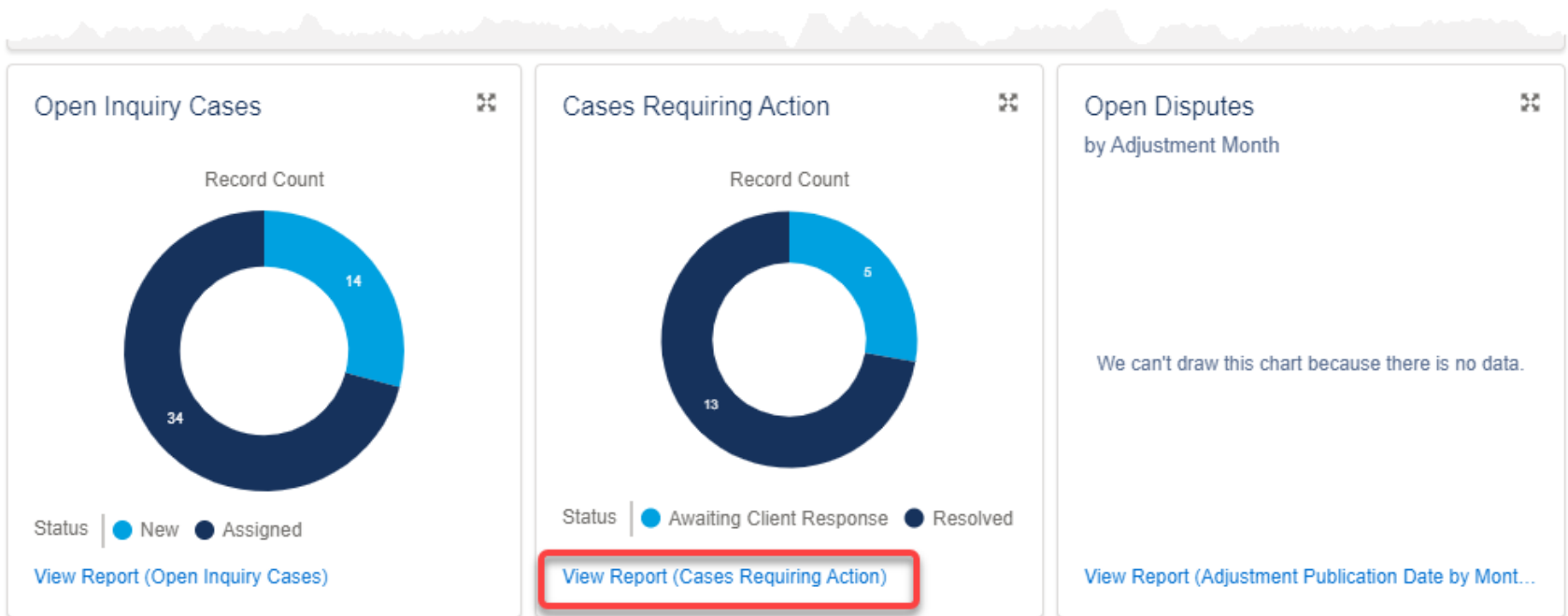


Enhancement Change Overview

- 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.

Viewing “Awaiting Client Response” Tickets

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.

Report: Cases
Cases Requiring Action

Total Records
18



Status ↑	Case Number	Category	Subject	Description
<input type="checkbox"/> Awaiting Client Response (5)	00238885	-	06/29/21 - "Testing Provide Client Response" function #1	06/29/21 - "Testing Pro
	00237273	Reliability Coordinator Inquiry	04/28/21 - Testing - Please ignore	Validating the "Provide
	00238818	Reliability Coordinator Inquiry	testing	testing12345t6 more to
	00235868	ADS	ADS Connectivity issue	Phone Number:(408)-5 Contact Name: Ilavaras Email: EIOFMSupportD Organization: Other Comments:Please chec User ID: "ymiddlewz

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.

Status
Resolved - Pending Validation

Case Number
00235652



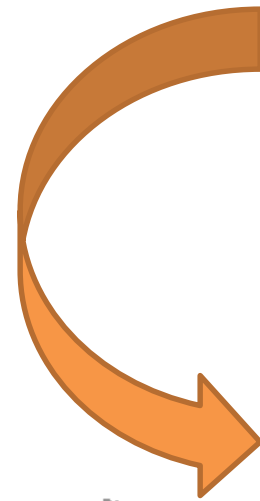
Case
06/29/21 - "Testing Provide Client Response" function #1

Status
Awaiting Client Response

Case Number
00238885

Provide Client Response

Printable View



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.

System Information

Date/Time Opened
6/29/2021 7:23 AM

Date/Time Closed

Case Comments



Provide Client Response

Created By: Manichanh Mouanetry (6/29/2021 7:27 AM)
Need more info.

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.

Upload Files Or drop files

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

System Information

Date/Time Opened
6/29/2021 7:23 AM

Date/Time Closed

Case Comments

Provide Client Response

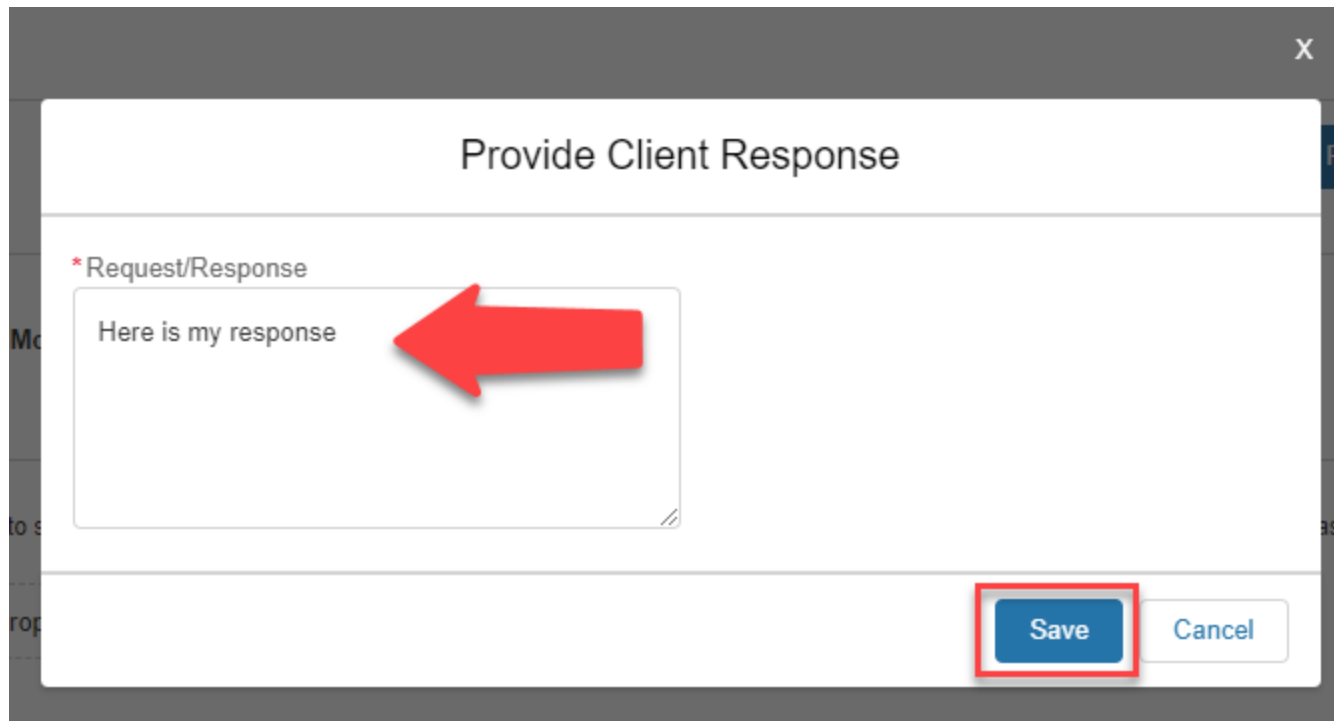
Created By: Manichanh Mouanetry (6/29/2021 7:27 AM)
Need more info.

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.

Upload Files Or drop files

Providing a Client Reponse

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



Provide Client Response

*Request/Response


Here is my response

Save Cancel

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.

 Case 06/29/21 - "Testing Provide Client Response" function #1

Status
Assigned

Case Number
00238885


Case Information


Review for Price Correction

Case Number
00238885

Functional Environment 

Production

Follow-up Date 

Metering Inquiry 

Status
Assigned

Account Name
California ISO

SCID

“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!

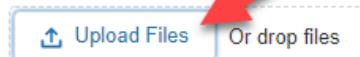


The screenshot shows a web form titled "Case Comments". In the top right corner, there is a blue button labeled "Add Comment". Below the title, there is a text input field with the label "* Comment" and the placeholder text "Another comment". A red arrow points from the top left of the input field towards the "Save" button. At the bottom left of the form, there are two buttons: a blue "Save" button and a white "Cancel" button. The "Save" button is highlighted with a red rectangular border.

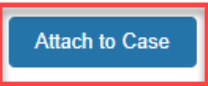
Attachments

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




View File	File name	Size	Last Modified	Created By
-----------	-----------	------	---------------	------------

Attachments

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](#) Add Comment

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 STATUSES

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