Customer Inquiry Dispute & Information Contact List Desk Guide

Version 1.1

California ISO

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California ISO

Revision History

Version No.	Date	Revised By	Description
1	1/2026	Kyle C.	Initial Guide
1.1	5/2026	Kyle C.	Added appendix of contact type descriptions

California ISO

Background

The purpose of this document is to provide an overview of the process and ability for CAISO Scheduling Coordinators to view and maintain their company's CAISO Contacts live within the CIDI application. Prior to this enhancement, CAISO maintained a spreadsheet-based contact list that required manual upload of contact information and was not accessible by participants.

Roles & Responsibilities

Roles	Description
CIDI User Access Administrator (UAA)	View and Edit Company Contacts. Responsible for reviewing and confirm annually that their company's contacts are up to date.
CIDI User	View rights for Company Contacts (if applicable)

Process Overview

All organizations with the contract types below are required to maintain company contacts and will be presented with a Contact List in CIDI:

SC = Scheduling Coordinator

WEIM = Western Energy Imbalance Market Entity

EDAM = Extended Day-Ahead Market Entity

CRR = Congestion Revenue Rights Holder Allocation / Auction

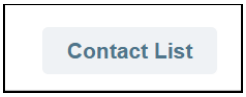
CB = Convergence Bidding Entity

TO = Transmission Owner

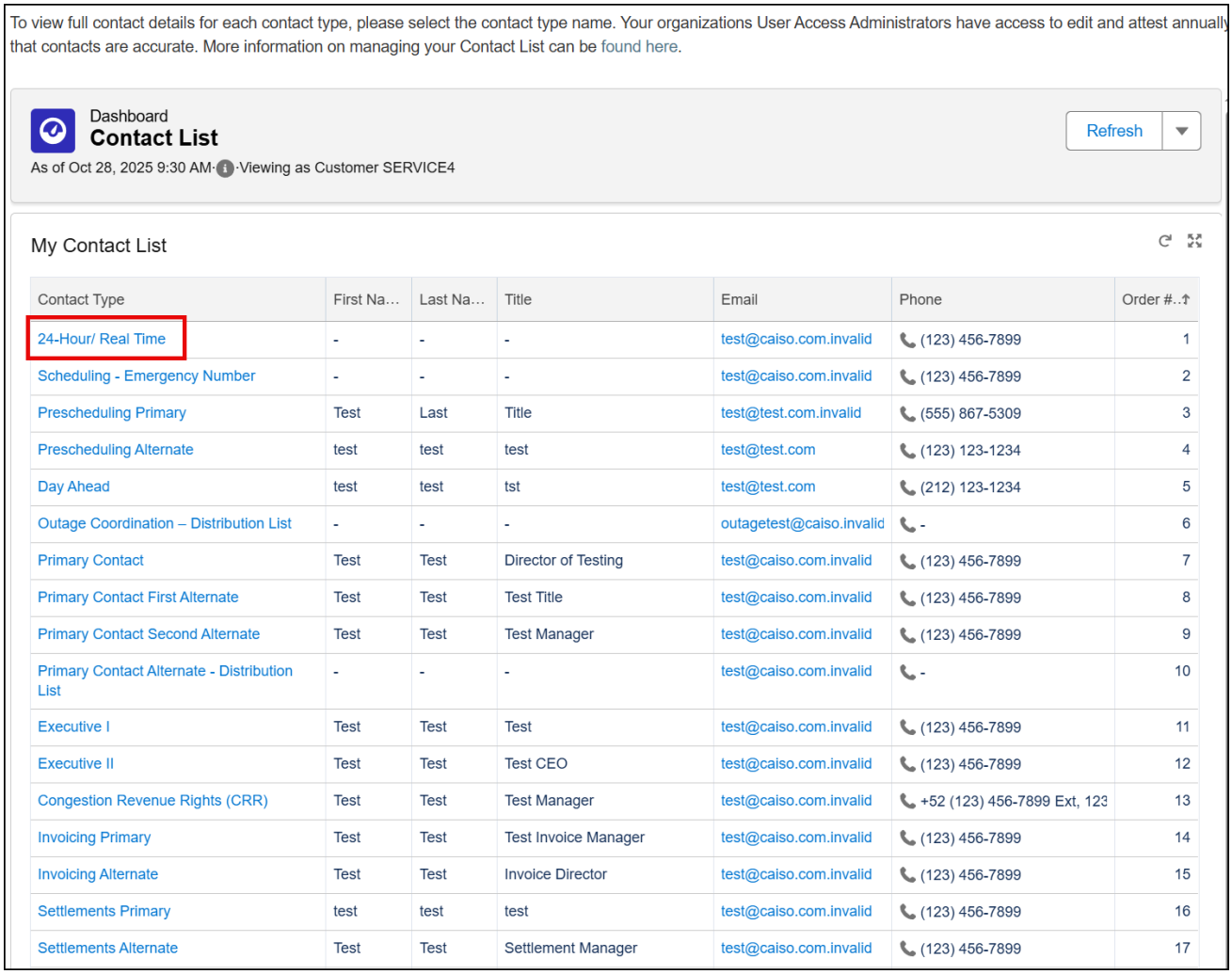
Reliability Coordinator contacts are managed within the RC Portal and not in CIDI at this time. If your organization has a contact list in CIDI, please see the below view contacts process (standard user) and edit contacts processes (UAA user).

View Contacts Process:

To view your company's, contact list, access the CIDI application and then select 'Contact List' on the toolbar as shown below:



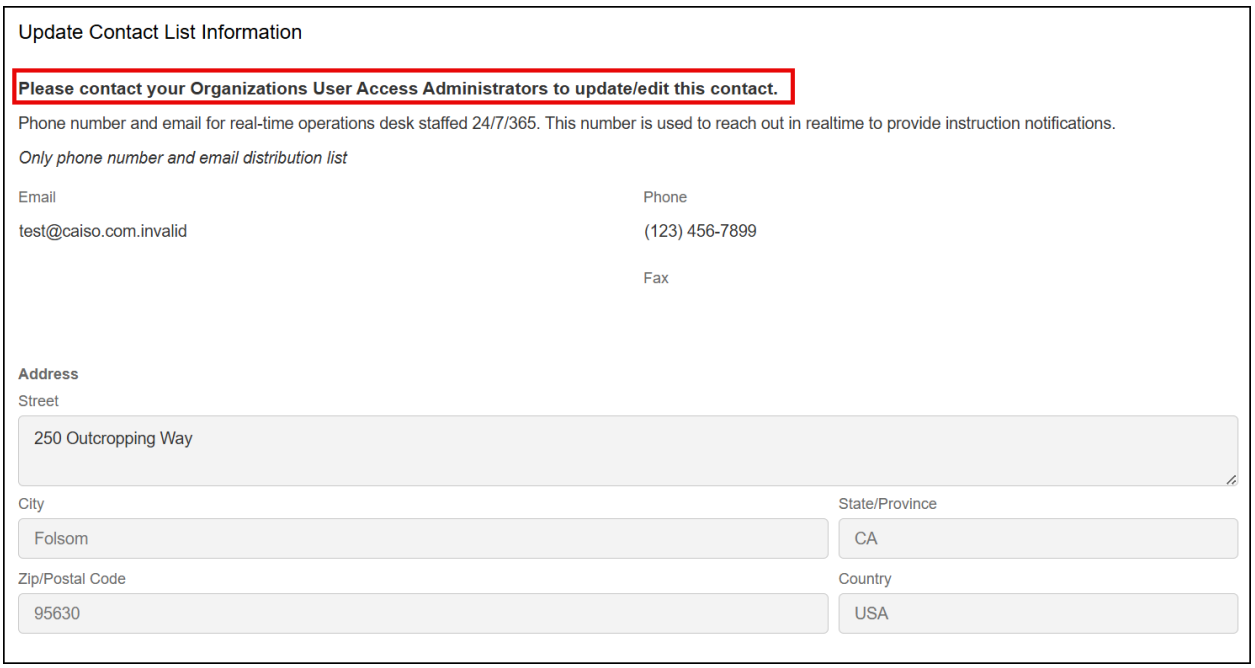
On the main Contact List page, users will be presented with a dashboard of high-level contact information. To view individual full contact details, users can select each Contact Type name:



Contact Type	First Na…	Last Na…	Title	Email	Phone	Order #..
24-Hour/ Real Time	-	-	-	test@caiso.com.invalid	(123) 456-7899	1
Scheduling - Emergency Number	-	-	-	test@caiso.com.invalid	(123) 456-7899	2
Prescheduling Primary	Test	Last	Title	test@test.com.invalid	(555) 867-5309	3
Prescheduling Alternate	test	test	test	test@test.com	(123) 123-1234	4
Day Ahead	test	test	tst	test@test.com	(212) 123-1234	5
Outage Coordination – Distribution List	-	-	-	outagetest@caiso.invalid	-	6
Primary Contact	Test	Test	Director of Testing	test@caiso.com.invalid	(123) 456-7899	7
Primary Contact First Alternate	Test	Test	Test Title	test@caiso.com.invalid	(123) 456-7899	8
Primary Contact Second Alternate	Test	Test	Test Manager	test@caiso.com.invalid	(123) 456-7899	9
Primary Contact Alternate - Distribution List	-	-	-	test@caiso.com.invalid	-	10
Executive I	Test	Test	Test	test@caiso.com.invalid	(123) 456-7899	11
Executive II	Test	Test	Test CEO	test@caiso.com.invalid	(123) 456-7899	12
Congestion Revenue Rights (CRR)	Test	Test	Test Manager	test@caiso.com.invalid	+52 (123) 456-7899 Ext, 123	13
Invoicing Primary	Test	Test	Test Invoice Manager	test@caiso.com.invalid	(123) 456-7899	14
Invoicing Alternate	Test	Test	Invoice Director	test@caiso.com.invalid	(123) 456-7899	15
Settlements Primary	test	test	test	test@caiso.com.invalid	(123) 456-7899	16
Settlements Alternate	Test	Test	Settlement Manager	test@caiso.com.invalid	(123) 456-7899	17

Note: Contact lists are stored by account (tied to certificate account access). Users with endorsed access will only see the contacts associated with their primary account. If access is required to other accounts, you must obtain a certificate under such account.

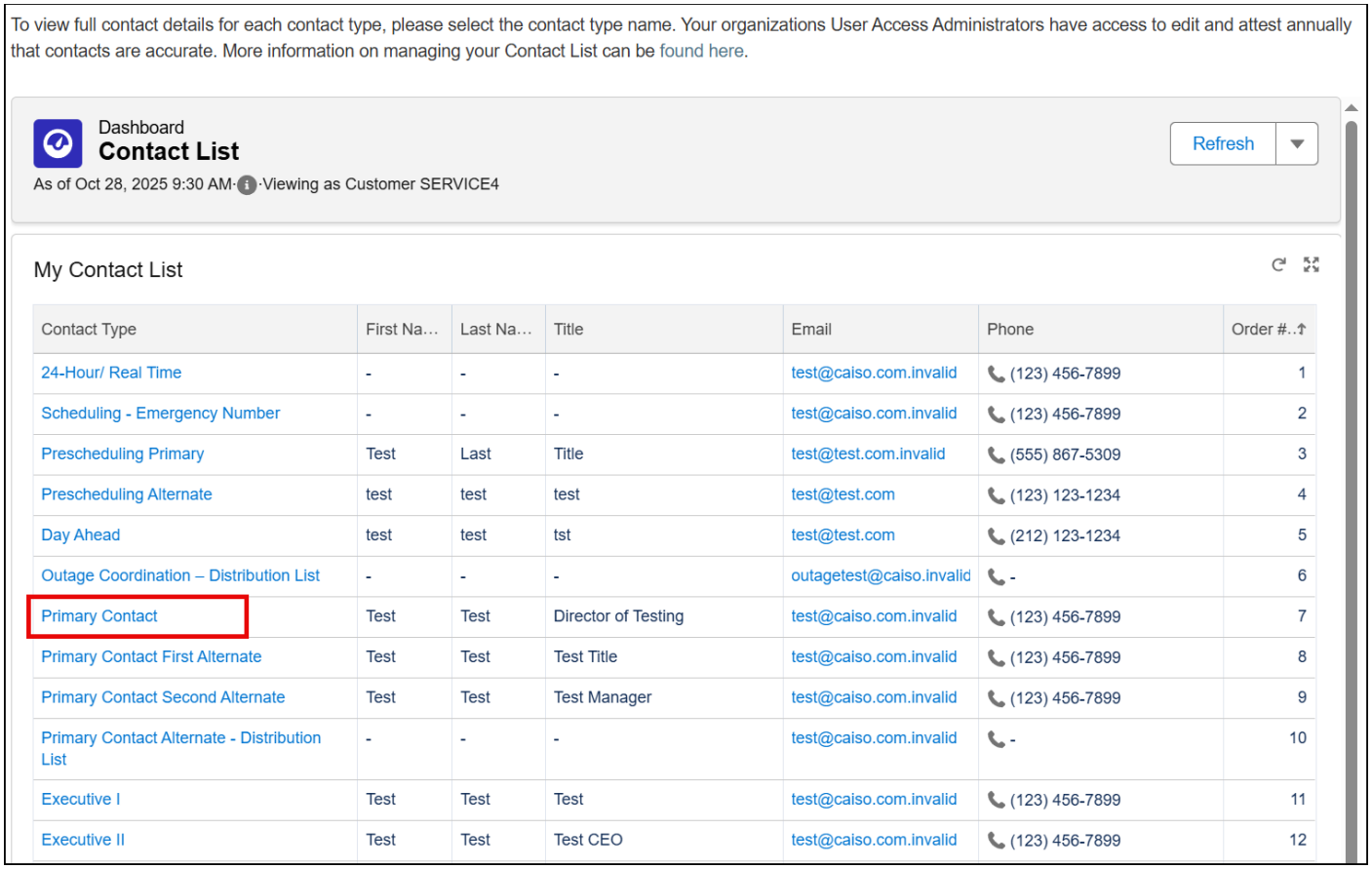
The below view is for users that do not have edit access. Only organizations User Access Administrators (A may edit your companies contact information.



To view a report of all fields, select 'view report' on the bottom of the dashboard view:

Edit Contacts Process:

User Access Administrators have edit rights for company contact lists. To edit contacts, users should select the Contact Name:



To view full contact details for each contact type, please select the contact type name. Your organizations User Access Administrators have access to edit and attest annually that contacts are accurate. More information on managing your Contact List can be found here.

Dashboard
Contact List
As of Oct 28, 2025 9:30 AM · Viewing as Customer SERVICE4

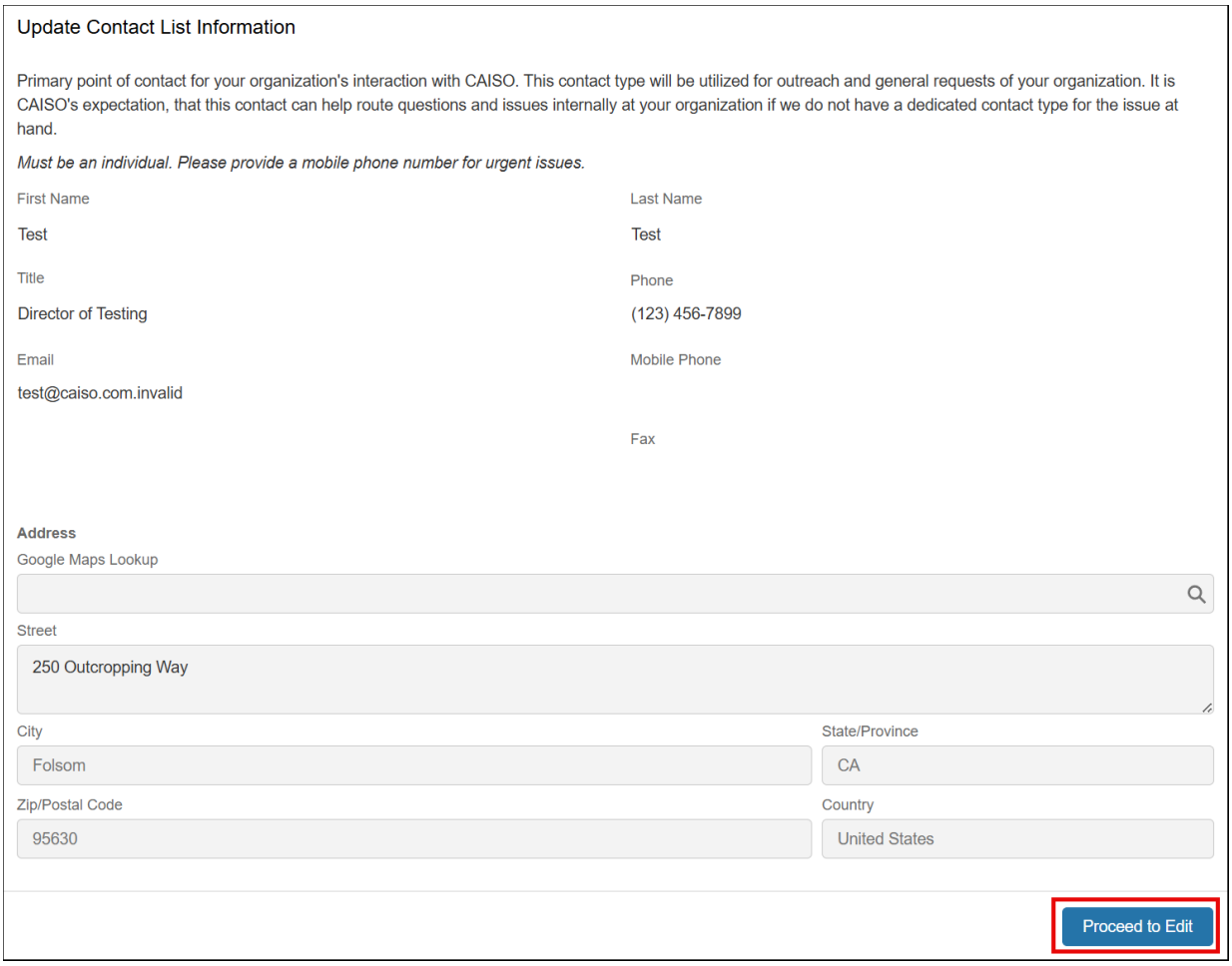
Refresh

My Contact List

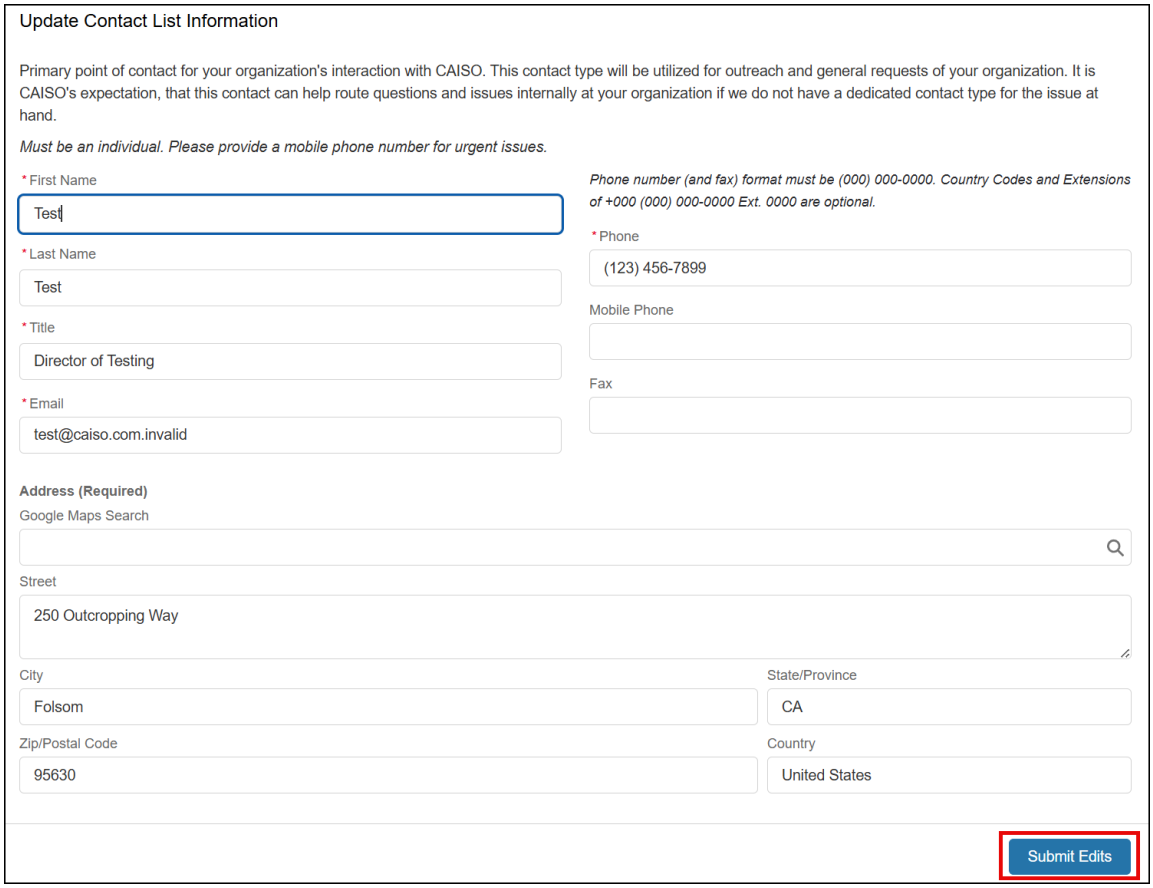
Contact Type	First Na…	Last Na…	Title	Email	Phone	Order #..
24-Hour/ Real Time	-	-	-	test@caiso.com.invalid	(123) 456-7899	1
Scheduling - Emergency Number	-	-	-	test@caiso.com.invalid	(123) 456-7899	2
Prescheduling Primary	Test	Last	Title	test@test.com.invalid	(555) 867-5309	3
Prescheduling Alternate	test	test	test	test@test.com	(123) 123-1234	4
Day Ahead	test	test	tst	test@test.com	(212) 123-1234	5
Outage Coordination – Distribution List	-	-	-	outagetest@caiso.invalid	-	6
Primary Contact	Test	Test	Director of Testing	test@caiso.com.invalid	(123) 456-7899	7
Primary Contact First Alternate	Test	Test	Test Title	test@caiso.com.invalid	(123) 456-7899	8
Primary Contact Second Alternate	Test	Test	Test Manager	test@caiso.com.invalid	(123) 456-7899	9
Primary Contact Alternate - Distribution List	-	-	-	test@caiso.com.invalid	-	10
Executive I	Test	Test	Test	test@caiso.com.invalid	(123) 456-7899	11
Executive II	Test	Test	Test CEO	test@caiso.com.invalid	(123) 456-7899	12

Note: The contact types available to your organization are based on your contract types. Currently, the CAISO does not allow more than the identified contact types.

Under each contact type, users can see a description of the contact type and current contact details. To edit, select 'Proceed to edit':

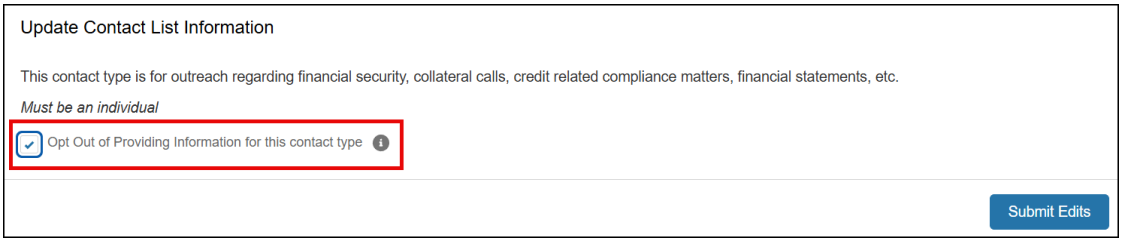


When editing, users will be prompted with applicable fields. Certain fields are required as shown by an *:

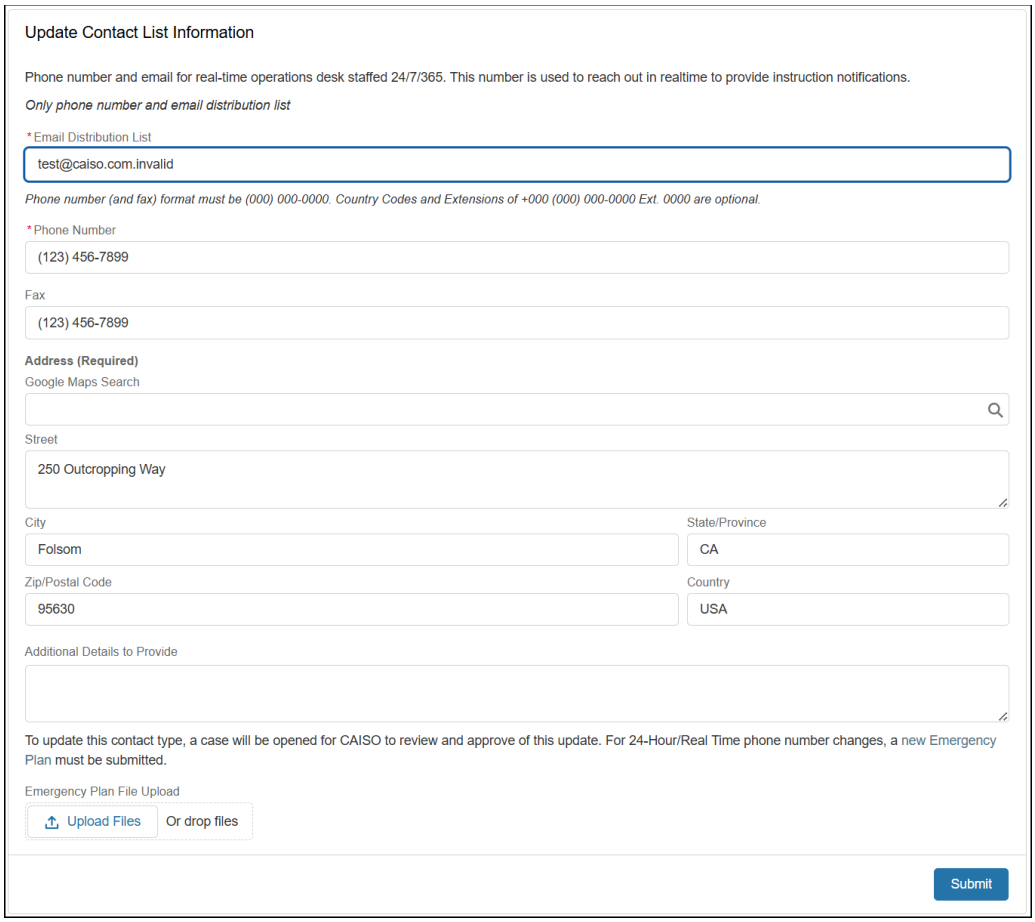


Note:

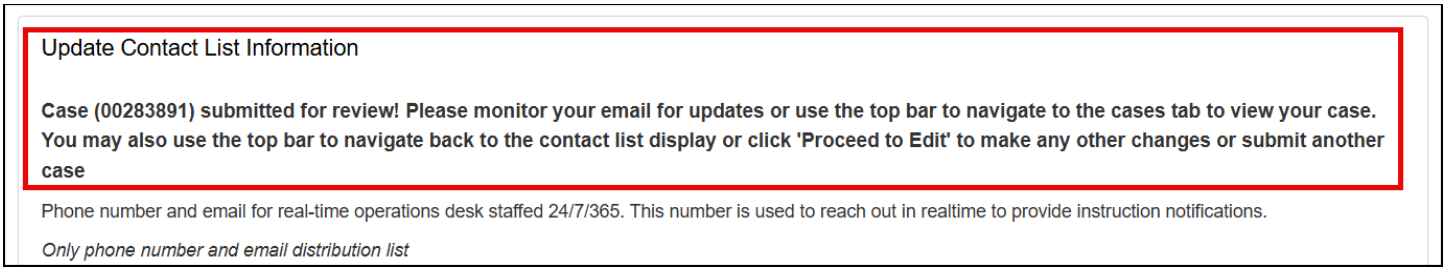
- Specific formatting is required for phone numbers as mentioned on screen: *"Phone number (and fax) format must be (000) 000-0000. Country Codes and Extensions of +000 (000) 000-0000 Ext. 0000 are optional."*
- To enter addresses, a Google Maps Search is available for most addresses to quickly fill-in addresses.
- Most contact updates are immediately updated (except those identified below). Some CAISO down steam systems, such as metering alerts may take up to 24 hours to update.
- If your company has more contacts than contact types, you may provide an email distribution list.
- Certain contact types are optional and can be opted out:



24/7 Real-Time and Outage Coordination contacts update submissions are not immediately implemented. Submitting updates will open a **CIDI case** for CAISO to update these contact types:



Upon submission of updates, users will be presented with a case number for CAISO to process. Following review, the submitter will be alerted of successful updates via standard CIDI case alerts.

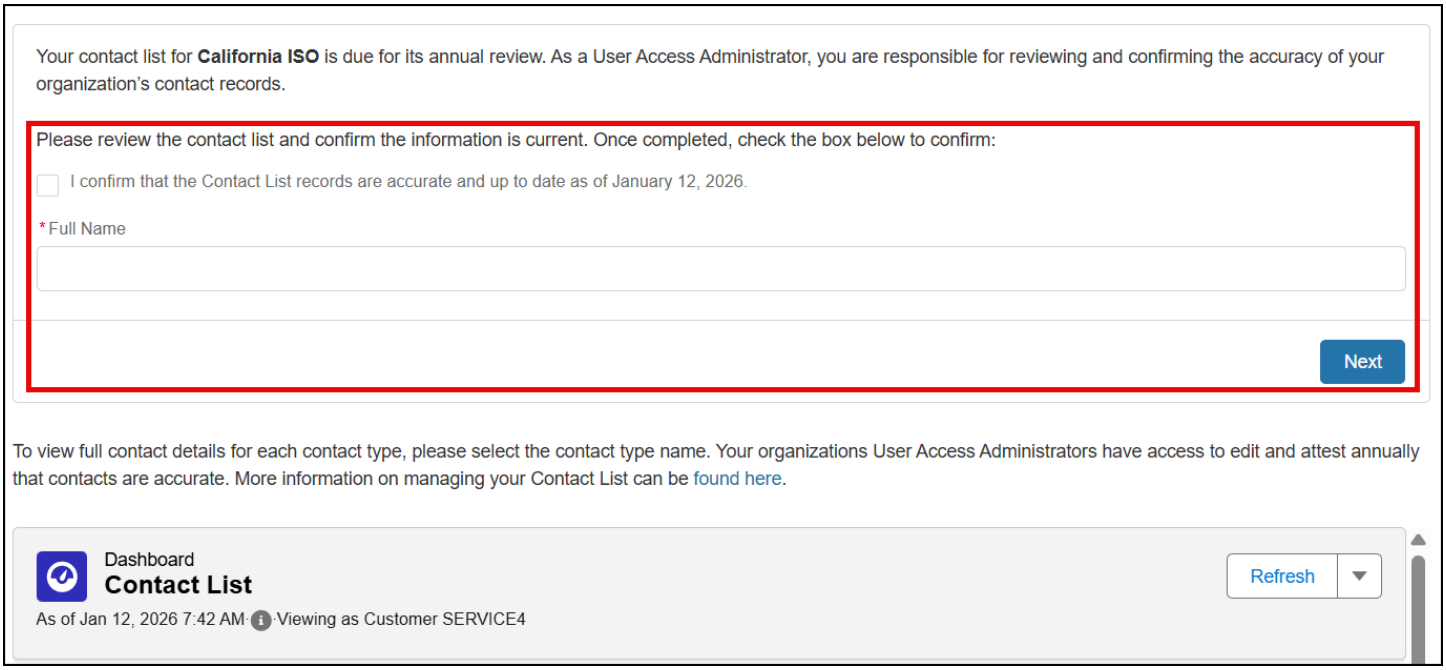


Annual Confirmation of Contacts

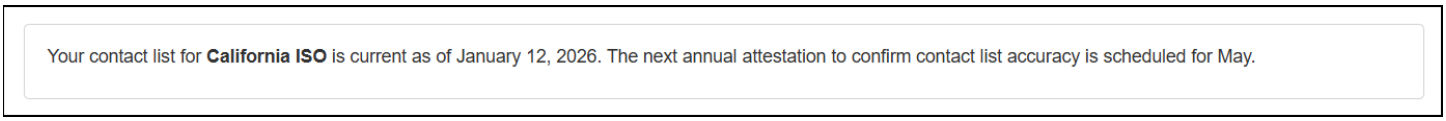
As detailed in the Scheduling Coordinator Certification and Termination Business Practice Manual, organizations are required to confirm that their contacts are up to date and accurate annually by **June 1st**.

Annually on May 1st, CAISO will alert all organizations that their contact list is due for confirmation via email to your active User Access Administrators and identified Primary Contacts.

Upon receipt of email, User Access Administrators should log-in to CIDI, review their contacts for accuracy and follow the below process to confirm that their contacts are accurate:



CAISO will send reminder emails until confirmation is received on or around **May 15th** and **25th** that your contact list is due for review by June 1st. Following June 1st, organizations out of compliance will be contacted individually for contact updates. Once confirmed, the following message will appear until the next confirmation period:

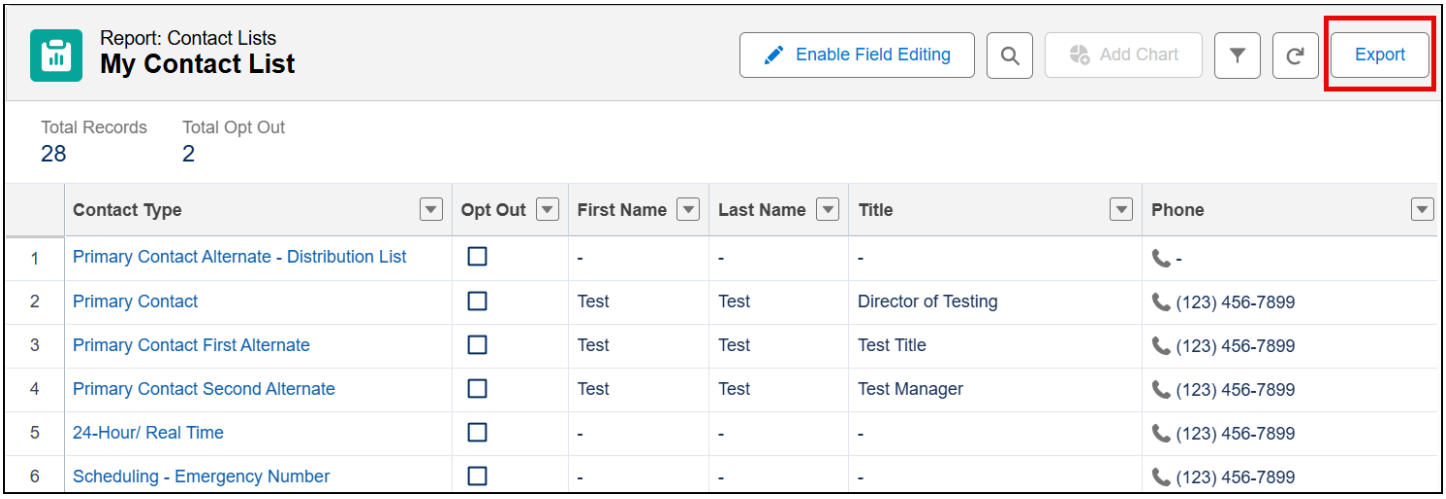


Download Process:

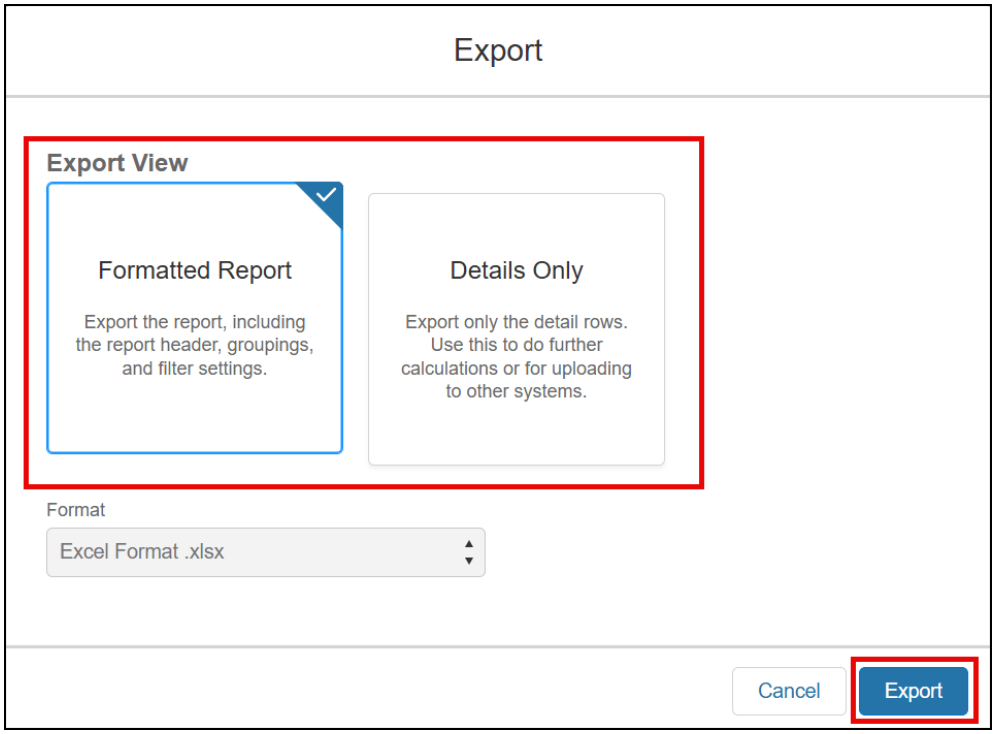
If organizations wish to download your contacts in excel format. All users with access can follow the following steps:

1. Select 'View Report' on bottom of main Dashboard page:

2. On the report view, select the drop-down arrow, then select 'Export':



Users can then select a formatted report or details only file which will be downloaded to your browser:



Users select a Formatted Report (recommended) or Details only for the export. Below is an example partial section of the formatted report:

My Contact List

As of 2025-11-12 09:47:28 Pacific Standard Time/PST

Filtered By

Show: All contact lists

Contact Type	Opt Out	First Name	Last Name	Title	Phone	Fax
Primary Contact Alternate - Distribution List	FALSE					
Primary Contact	FALSE	Test	Test	Director of Testing	(123) 456-7899	
Primary Contact First Alternate	FALSE	Test	Test	Test Title	(123) 456-7899	
Primary Contact Second Alternate	FALSE	Test	Test	Test Manager	(123) 456-7899	
24-Hour/ Real Time	FALSE				(123) 456-7899	
Scheduling - Emergency Number	FALSE				(123) 456-7899	
Prescheduling Primary	FALSE	Test	Last	Title	(555) 867-5309	(555) 867-5309
Prescheduling Alternate	FALSE	test	test	test	(123) 123-1234	
Day Ahead	FALSE	test	test	tst	(212) 123-1234	
Outage Coordination – Distribution List	FALSE					
Executive I	FALSE	Test	Test	Test	(123) 456-7899	
Executive II	FALSE	Test	Test	Test CEO	(123) 456-7899	
Invoicing Primary	FALSE	Test	Test	Test Invoice Manager	(123) 456-7899	
Invoicing Alternate	FALSE	Test	Test	Invoice Director	(123) 456-7899	
Congestion Revenue Rights (CRR)	FALSE	Test	Test	Test Manager	+52 (123) 456-7899 Ext, 123	
Metering Primary	FALSE	Test	Test	Manager, Energy Management	(123) 456-7899	
Metering Alternate	FALSE	Test	Test	Test Manager	(123) 456-7899	
Settlements Primary	FALSE	test	test	test	(123) 456-7899	
Settlements Alternate	FALSE	Test	Test	Settlement Manager	(123) 456-7899	
Training Coordinator / Liaison	FALSE	Test	Test	Training Manager	(123) 456-7899	

System Issues/Help:

To report any issues with Contact List functionality, please open a CIDI Inquiry Ticket under Production.

Contact Type Appendix:

The required contacts are detailed by the 'Required for' column. Please only provide the contacts your organization currently has contracts for participation:

SC = Scheduling Coordinator

WEIM = Western Energy Imbalance Market Entity

EDAM = Extended Day-Ahead Market Entity

CRR = Congestion Revenue Rights Holder Allocation / Auction

CB = Convergence Bidding Entity

RC = Reliability Coordinator

TO = Transmission Owner

Contact Type	Required For	Description	Contact Notes
24-Hour / Real Time	**SC, WEIM, EDAM, RC, TO**	Phone number for real-time operations desk staffed 24/7/365. This number is used to reach out in real time to provide instruction notifications.	Only phone number and email distribution list
Scheduling - Emergency Number	**SC, WEIM, EDAM,**	Phone number for real-time Scheduling issues for ISO Operations to discuss with resource schedulers for resource imports / export schedules.	Only phone number and email distribution list
Prescheduling Primary	**SC, WEIM, EDAM,**	Contact for day-ahead Scheduling issues for ISO Operations to discuss with resource schedulers for resource imports / export schedules.	Must be an individual

Prescheduling Alternate	**SC, WEIM, EDAM,**	Alternate contact for day-ahead Scheduling issues for ISO Operations to discuss with resource schedulers for resource imports / export schedules.	Distribution list is recommended but not required
Day Ahead	**SC, EDAM**	Primary point of contact for Day Ahead bid questions or issues. This contact type should be available for questions surrounding the Day Ahead Market closure timeframe.	Distribution list is recommended but not required
Outage Coordination	**SC, WEIM, EDAM, RC, TO**	This distribution list will receive email notifications regarding outage questions and automated WebOMS notifications regarding outages impacting your organization. This email address applies to all ID's under your organizations account for resources for which Outages can be submitted.	Email address must be a distribution list
Primary Contact	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Primary point of contact for your organization's interaction with CAISO. This contact type will be utilized for outreach and general requests of your organization. It is CAISO's expectation, that this contact can help route questions and issues internally at your organization if we do not have a dedicated contact type for the issue at hand.	Must be an individual

Primary Contact Alternate (1)	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Alternate primary point of contact for your organization's interaction with CAISO. This contact type will be utilized for outreach and general requests of your organization. It is CAISO's expectation, that this contact can help route questions and issues internally at your organization if we do not have a dedicated contact type for the issue at hand.	Must be an individual
Primary Contact Alternate (2)	**Optional**	Alternate primary point of contact for your organization's interaction with CAISO. This contact type will be utilized for outreach and general requests of your organization. It is CAISO's expectation, that this contact can help route questions and issues internally at your organization if we do not have a dedicated contact type for the issue at hand.	Must be an individual
Primary Contact Alternate Distribution List	**Optional**	If your organization would like more than two Primary Contact Alternates, you may provide a distribution list to receive the above requests.	Email address must be a distribution list
Executive I	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Primary executive contact used for executive level communication's or important escalations. Typically this individual oversees organizations Primary Contacts / CAISO participation.	Must be an individual

Executive II	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Secondary executive contact used for executive level communication's or important escalations. Typically this individual oversees your organizations Executive I contact.	Must be an individual
Invoicing Primary	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Primary point of contact for CAISO invoicing issues or questions.	Must be an individual
Invoicing Alternate	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Alternate point of contact for CAISO invoicing issues or questions.	Distribution list is recommended but not required.
Rules of Conduct Primary	**Optional**	In addition to organizations Primary Contacts, Rules of Conduct contacts receive email notifications regarding Rules of Conduct investigations and associated penalties. This contact type is optional as your organizations Primary Contacts will receive our Rules of Conduct communication	Must be an individual
Rules of Conduct Alternate	**Optional**	In addition to organizations Primary Contacts, Rules of Conduct contacts receive email notifications regarding Rules of Conduct investigations and associated penalties. This contact type is optional as your organizations Primary Contacts will receive our Rules of Conduct communication	Must be an individual

Rules of Conduct Distribution List	**Optional**	In addition to organizations Primary Contacts, Rules of Conduct contacts receive email notifications regarding Rules of Conduct investigations and associated penalties. This contact type is optional as your organizations Primary Contacts will receive our Rules of Conduct communication. This contact type should be utilized if you with to have more than two additional individuals receive Rules of Conduct notices.	Must be a distribution list.
Congestion Revenue Rights (CRR)	**CRR**	This contact type is utilized by the Congestion Revenue Rights (CRR) team in the event of an issue or uncertainty around information submitted for any of the CRR processes, including Historical/Forecast Load Submission, CRR Allocations, and CRR Auctions. The contacts we are looking for are mainly those who use the CRR Market User Interface (MUI) to participate in CRR processes.	Distribution list is recommended but not required.
Settlements Primary	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Primary point of contact for CAISO Settlement issues or questions.	Distribution list is recommended but not required.
Settlements Alternate	**SC, WEIM, EDAM, CRR, CB, RC, TO**	Alternate point of contact for CAISO Settlement issues or questions.	Distribution list is recommended but not required.

Compliance	**Optional**	Primary point of contact for CAISO related compliance issues that may impact your organization.	Must be an individual
Credit	**Optional**	This contact type is for outreach regarding financial security, collateral calls, credit related compliance matters, financial statements, etc.	Must be an individual
Information Technology	**Optional**	This contact type is utilized for outreach on Information Technology (IT) related items. This contact may receive requests for feedback on CAISO IT changes or IT questions of your organization.	Must be an individual
Legal	**Optional**	This contact type is utilized for outreach on legal questions and or issues in regards to your organization's CAISO participation. This contact is typically a member of your counsel.	Must be an individual
Regulatory	**Optional**	This contact type is utilized for outreach on regulatory questions or policy issues in regards to your organization's CAISO participation.	Must be an individual
Metering Primary	**SC, WEIM, EDAM**	This contact type is used as a general point of contact for issues related to metering, telemetry, resource specific inquiries and notices for metering. Used to notify of late or missing data for all SCID's under your account.	Must be an individual

Metering Alternate	**SC, WEIM, EDAM**	This contact type is used as a general point of contact for issues related to metering, telemetry, resource specific inquiries and notices for metering. Used to notify of late or missing data for all SCID's under your account.	Distribution list is recommended but not required.
Training Coordinator	**SC, WEIM, EDAM, CRR, CB, RC, TO**	This contact type is utilized for training outreach, feedback, and training issues. Typically, this contact should be responsible for your employee training of users who interact with the CAISO.	Must be an individual