



California ISO

Customer Experience Improvements for Customer Inquiry and  
Dispute Information (CIDI) application

# Overview

- Purpose & Background
- Current Implementation
- Improvements
- Walk Through
- Upcoming Events & References
- Questions

# Purpose & Background

- The Customer Inquiry, Dispute & Information (CIDI) system is used to log and track market inquiries and settlement disputes.
- CIDI was first implemented in 2010 by the ISO with heavy customization. Because of this customization, the ISO has not been able to utilize the improved platform and enhancements offered by Salesforce.
- This has resulted in non-user friendly outdated design.

# Current Implementation

The screenshot displays the California ISO website interface. At the top, there are navigation tabs for 'Home', 'Cases', and 'Articles'. A blue arrow points to the 'Articles' tab with the label 'Self-Service Knowledge Bank'. Below the navigation is a user welcome message for 'David Francis' and a 'CIDI User Guide' link. The main content area features a large green header 'Introducing the Self-Service Knowledge Bank' followed by a paragraph explaining the initiative. Below this is a blue header 'Improved Settlements Dispute Process Transparency' with a paragraph detailing the new 'SDS' field. On the left sidebar, there are sections for 'Customer Portal-Helpful Links' (with a 'Log a case for customer support' link), 'Search' (with a search box and 'Go!' button), and 'Recent Items' (listing various case numbers and articles). A blue arrow points to the 'Log a case for customer support' link with the label 'New case entry link'. Another blue arrow points to the search box with the label 'Search for cases'. A third blue arrow points to the main content area with the label 'Where the ISO will post announcements on some of the upgrades to improve customer service. Hot topics will be posted here as well.' The bottom left corner shows the California ISO logo.

Home Cases Articles **Self-Service Knowledge Bank**

Welcome, David Francis  
CIDI User Guide: [http://www.caiso.com/Documents/CustomerInquiry\\_DisputeandInformation\\_CIDI\\_UserGuide.pdf](http://www.caiso.com/Documents/CustomerInquiry_DisputeandInformation_CIDI_UserGuide.pdf)

## Introducing the Self-Service Knowledge Bank

As part of the ISO objective to improve customer transparency and the ease of obtaining information, the ISO is pleased to introduce the initial deployment of the Self-Service Knowledge Bank. Customers are now able to click on the new "Articles" tab to search for answers to commonly asked questions or detailed articles on specific topics. While the current number of articles are limited, they will continue to grow over time to maximize the availability of information and improve self-service capabilities. In 2017 the ISO will continue to improve our customer's interactions by enhancing our CIDI interface and providing additional information pertaining to market conditions and results.

## Improved Settlements Dispute Process Transparency

In response to requests from our customers to increase the transparency of the Settlement Dispute process the California ISO is pleased to announce the inclusion of a new field in the SDS views called the Adjustment Publication Date. For each approved dispute this field provides the publication date of the settlement statement that will reflect the expected adjustment. This field has been added to all existing Settlement Dispute views in CIDI that begin with "SDS". In addition, a newly created summary view called SDS Adjust Pub Date has been added for further increased transparency.

**Log a case for customer support**  
View cases

Search  
Search All  
Go!  
Advanced Search

Recent Items

- 00189344
- 00189882
- 00186386
- Access Identity Management system (AIM) users keep disappearing when attempting to submit access request
- Resource Adequacy (RA) Replacement and Substitution
- Not awarded correctly for Ancillary Services (A/S)
- CAISO recognizes net-scheduling

Find Articles  
Go!

**New case entry link**  
**Search for cases**

**Where the ISO will post announcements on some of the upgrades to improve customer service. Hot topics will be posted here as well.**

# Q4 2018 Improvements

The ISO has upgraded its current CIDI platform to Salesforce Communities. This upgrade will enable the following:

- Improved look and feel
    - Removal of non-functional fields
  - Case Tracking
    - External Dashboards & Reporting
  - Self Help Capabilities
    - Knowledge Base
    - Predictive Search
  - Improved Case Search & Result Refining
  - Removal of customization\*
- 
- *\*allowing for future enhancements more easily.*

# Communities Homepage

Help Center Knowledge articles Cases

3 System Operating Messages

CISO\_INTERNAL ONLY\_USER

Submit a Case

How can we help you?

Search knowledge articles and cases...

## Today's System Operating Messages

- Urgent**  
11/26/2018 8:32 PT  
Effective Immediately the WSTWMEAD\_ITC is changed . The CISO will provide updates for any changes in transmission line rating status.
- Urgent**  
11/26/2018 6:52 PT  
Effective Immediately the MALIN500 and COTPISO\_ITC TTC in the Import direction is changed HE07 to HE10 on 11/29/18. The CISO will provide updates for any changes in transmission line rating status.

## Knowledge articles

★ **FEATURED** How often is interest updated in the collateral bank account?

### TRENDING

- How often is interest updated in the collateral bank account?  
If a participant is unable to login into to the Union Bank portal. How do they retrieve their user ID or reset the accounts password?
- Who does a participant contact if they have questions regarding the content of their bank statements?
- How do a participant gain access to their cash collateral bank statements?  
Once the name has been changed on the Union Bank collateral account, when does it reflect on the settlement statements?

## Recently viewed cases

00208658	test3
00208651	test2
00208438	Test Case - please ignore
00208660	test4
00206134	SFTP access

## 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.

# Communities - Knowledge

Knowledge articles Cases

## Knowledge articles

🔍 Search knowledge articles and cases...

### Browse by category

Market Solution  
Settlements and Metering  
Bidding and Scheduling

Application Access  
OASIS and CMRI

Resource Adequacy

### ★ Featured

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

### 📈 Trending

1. Do I need to contact the ISO Credit Team if I want to increase my Letter of Credit?
2. Do I need to request a Letter of Credit reduction with the ISO prior to working with my bank?
3. Does the ISO allow changes to the ISO Form Letter of Credit?
4. Will the ISO accept a Letter of Credit from a foreign financial institution?
5. What credit ratings are accepted by the ISO?

### 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

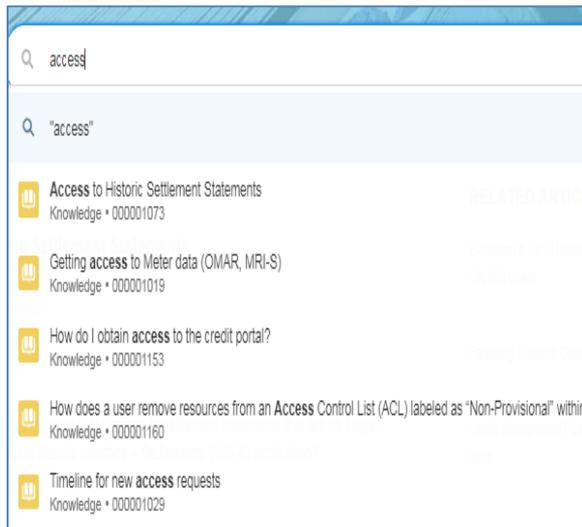
Centralized, single sign-on access to applications and data.

#### Calendar

Find upcoming and past meetings and events, and related documents.

# Communities – Knowledge Cont.

## Predictive Search

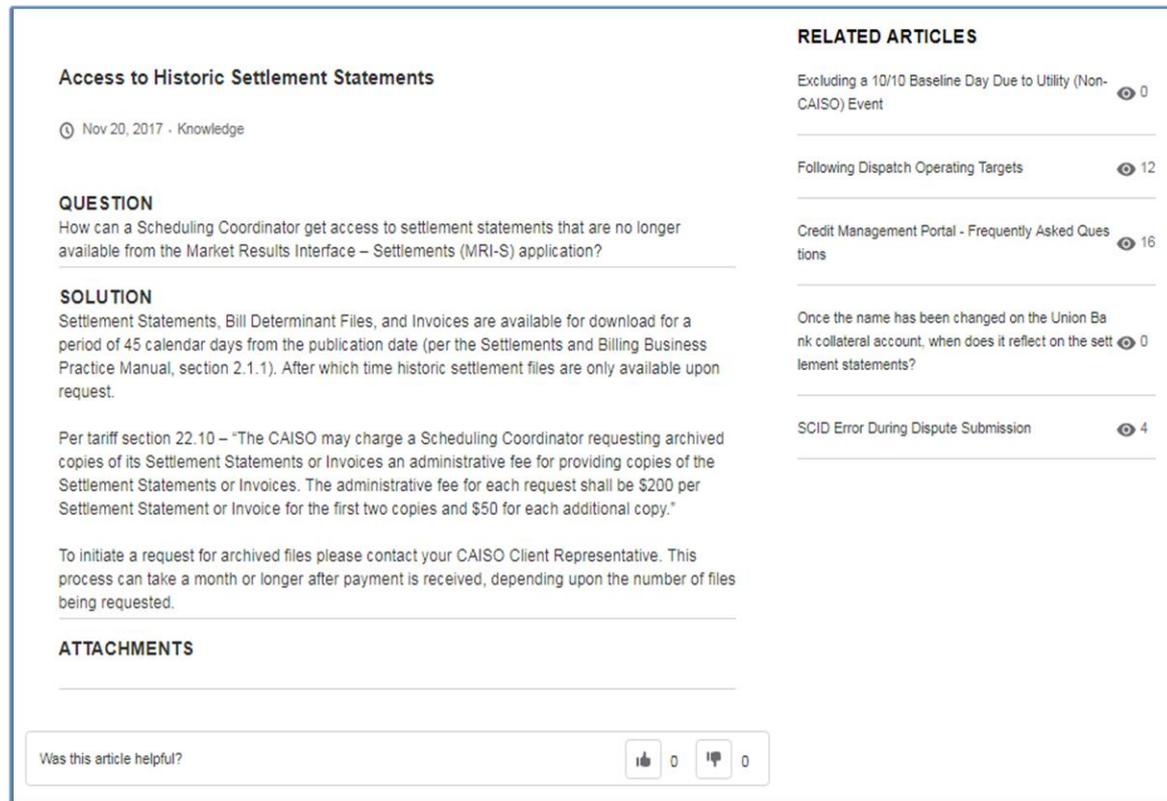


Q access

Q "access"

-  Access to Historic Settlement Statements  
Knowledge • 000001073
-  Getting access to Meter data (OMAR, MRI-S)  
Knowledge • 000001019
-  How do I obtain access to the credit portal?  
Knowledge • 000001153
-  How does a user remove resources from an Access Control List (ACL) labeled as "Non-Provisional" within  
Knowledge • 000001160
-  Timeline for new access requests  
Knowledge • 000001029

Knowledge Article →



### Access to Historic Settlement Statements

Nov 20, 2017 · Knowledge

**QUESTION**  
How can a Scheduling Coordinator get access to settlement statements that are no longer available from the Market Results Interface – Settlements (MRI-S) application?

**SOLUTION**  
Settlement Statements, Bill Determinant Files, and Invoices are available for download for a period of 45 calendar days from the publication date (per the Settlements and Billing Business Practice Manual, section 2.1.1). After which time historic settlement files are only available upon request.

Per tariff section 22.10 – "The CAISO may charge a Scheduling Coordinator requesting archived copies of its Settlement Statements or Invoices an administrative fee for providing copies of the Settlement Statements or Invoices. The administrative fee for each request shall be \$200 per Settlement Statement or Invoice for the first two copies and \$50 for each additional copy."

To initiate a request for archived files please contact your CAISO Client Representative. This process can take a month or longer after payment is received, depending upon the number of files being requested.

**ATTACHMENTS**

Was this article helpful?  0  0

### RELATED ARTICLES

- Excluding a 10/10 Baseline Day Due to Utility (Non-CAISO) Event  0
- Following Dispatch Operating Targets  12
- Credit Management Portal - Frequently Asked Questions  16
- Once the name has been changed on the Union Bank collateral account, when does it reflect on the settlement statements?  0
- SCID Error During Dispute Submission  4

# Communities - Cases

Knowledge articles **Cases**

## Cases

Search knowledge articles and cases...

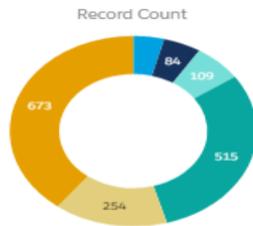


DASHBOARD  
**Inquiry Community Dashboard**

As of Nov 26, 2018 11:27 AM Viewing as Ronald King

Refresh

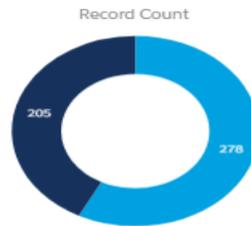
### Cases In-progress



Case Age Range | ● One Week ● Two Weeks

[View Report \(Cases In-progress\)](#)

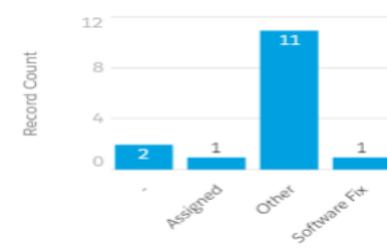
### Cases in My Queue



Status | ● Awaiting Client Response ● Resolve

[View Report \(Cases In My Queue\)](#)

### Cases On Hold



Internal Status

[View Report \(Cases On Hold\)](#)



Cases  
**IMS All Closed Cases (Portal)**

50+ items • Sorted by Date/Time Closed • Filtered by all cases - Status, Type, SCID • Updated a few seconds ago

Search this list...



# Upcoming Events & References

- Stakeholder Customer Partnership Group to be formed for CIDI with the first meeting in early February (details will be sent via Market Notice once scheduled).
  - Please submit enhancement requests for CIDI via an Inquiry ticket with the following subject: “2019 CIDI Enhancement Requests”
  - Here is where the ISO will be going through the enhancement requests submitted by participants and soliciting feedback.

Customer Inquiry, Dispute & Information (CIDI) user guide:

[http://www.caiso.com/Documents/NewCustomerInquiry\\_DisputeandInformation\\_CIDI\\_UserGuide.pdf](http://www.caiso.com/Documents/NewCustomerInquiry_DisputeandInformation_CIDI_UserGuide.pdf)

# Questions?