

Confidentiality

- IMO is bound by market rules for confidentiality of information
- All MPs are covered by the market requirements of confidentiality
- MSPs by agreement with the IMO, are also required to follow the market requirements of confidentiality
- Registration information and metering data are both confidential information.
- All breaches of confidentiality have to be reported to the Compliance Group of the IMO

MSPs & metering data

- MSPs who work outside their own utility may run into confidentiality problems
- Form 1300 assigns an MSP to a delivery point
- When the IMO gets these instructions from the MMP it enables PLC such that the MSP can see the metering data for that delivery point
- If the MSP is an independent organization with their own MPID - no problem

MSPs & metering data (cont)

- MSPs that are not independent may have a problem.
- The metering data cannot be shared with the MMP
- Must ensure that the metering data is handled in accordance with market confidentiality.
- This may be a problem where they share the same MPID which would allow the MMP to see another MMPs metering data.
- The solution is up to the MSP and the MMP

IMO Option

- The IMO does offer an option to the MSP - a different MPID from its MMP
- Some MSPs have taken advantage of this and now have separate IDs
- May require a new MSP agreement.
- If the existing registered MSP has restructured or incorporated into a separate, legal entity away from the MMP entity, then it should obtain a new PLC number and submit a new MSP agreement.
- Requires a different digital certificate for the MSP

IMO Option (cont'd)

- Requires PLC setups for User Information
- Requires PLC setups for IMO System Access
- Requires PLC setups for MSP/Resource (Delivery Point) Relationship



Bookmarks Location: <https://mos.theimo.com/imo/> What's Related

Instant Message WebMail Radio People Yellow Pages Download Calendar Channels



Feb 11, 2004 11:46

MP ONTARIOIMO (ONTARIOIMO)
user WONGN (WONGN)

- Home
- Home
- Administration
- Metering
- Registration
- Logout





Bookmarks Location: <https://mos.theimo.com/imo/>



IMO
Independent
Electricity
Market Operator
Feb 11, 2004 11:53

MP ONTARIOIMO (ONTARIOIMO)
user WONGN (WONGN)

Home

IMO System Messages Display - Netscape

System Messages Display

2004/02/11 11:51:25	RTPM Dispatch Constrained 5 minute OPRV schedules published for date: 20040211, hour: 12
---------------------	--

IMO Market Status Display - Netscape

Market Status Display

Generated 2004/02/11 11:51:03

Legend - Green text denotes current state.

FM_DAEF Market Status

Market Day Open Closed

Please select a Meter, Quantity, and Date range

Meter Path (Meter ID: Meter Type: Delivery Point)

Quantities

- Owned
- 100094: Owned: ONTARIOIMO
- 100187: Owned: ONTARIOIMO
- 100222: Owned: ONTARIOIMO
- 100394: Owned: ONTARIOIMO

- Current
- Without Losses
- Current Validated
- With Losses
- Version#
- First
- Use Date

Data for this channel is available from

No Data Available to No Data Available

Current selection:

No Data Available to No Data Available



Show Report

Please Double Click On Owned, Associated, or Allocated To Expand Delivery Points

Please select a Meter, Quantity, and Date range

Meter Path (Meter ID: Meter Type: Delivery Point)

Owned

- 100094: Owned: ONTARIOIMO
 - 0200587300: Owned: ONTARIOIMO: Meter
 - 0200587300E: Owned: ONTARIOIMO: Sum

Quantities

- KWH**
- KVARH
- KVARH
- KVAH

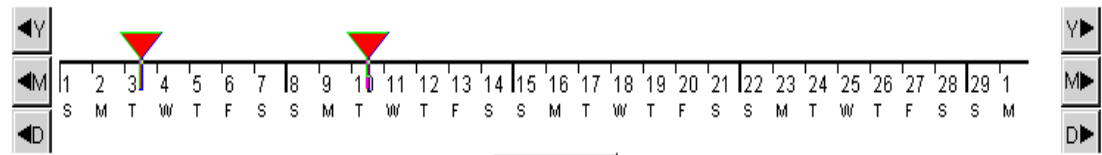
- Current
- Without Losses
- Current Validated
- With Losses
- Version#
- First
- Use Date

Data for this channel is available from

Mon Jan 1 2001 to Fri Dec 31 2004

Current selection:

Tue Feb 3 2004 to Tue Feb 10 2004



Show Report





Change of MSP Registration Details

Please complete a copy of this form to effect changes to your *metering service provider* registration information. This form and accompanying documents may be submitted by mail, courier, or fax.

Mail this form and accompanying documents to:

Independent Electricity Market Operator
Attention: Metering Technical Group
Station A, P.O. Box 4474
Toronto, ON M5W 4E5

Courier this form and accompanying documents to:

Independent Electricity Market Operator
Attention: Metering Technical Group
655 Bay Street, Suite 410
Toronto, ON M5G 2K4

Fax this form and accompanying documents to:

Fax No.: (905) 855-8688
Attention: Metering Technical Group

All information submitted in this process will be used by the *IMO* solely in support of its obligations under the "Electricity Act, 1998", the "Ontario Energy Board Act, 1998", the "Market Rules" and associated policies, standards and procedures and its licence. All submitted information will be assigned the appropriate confidentiality level upon receipt.

Terms and acronyms used in this Form that are italicized have the meanings ascribed thereto in Chapter 11 of the "Market Rules".

PART 1 – GENERAL INFORMATION (MUST BE COMPLETED)

Metering Service Provider

MSP Registered Name:

MSP Registered Contact:

MSP ID No.: Effective Date of Change:



Application Form for the Registration of Metering Service Providers in the IMO- Administered Market

Issue 2.0

This Application Form will enable *Metering Service Providers* to register with the *IMO* to operate in the Wholesale Electricity Market.

7. Form

A. General Information

1. Name

Name of Organization to be Registered: _____
 Short Name: _____ (up to 12 characters)

2. Business Address

Address (if R.R., give Lot, Concession No. And Township):

City: _____ Prov: _____ Country: _____ Postal/ZIP Code: _____

Phone Number: _____ FAX Number: _____ E-mail Address: _____

3. Primary contact for this Application

Mr. Mrs. Last Name: _____ Full First Name: _____ Initial: _____

Miss. Ms. _____

Position Held: _____

Other: _____

Contact Address (if R.R., give Lot, Concession No. And Township) if different from the address noted in item 2 above:

City: _____ Prov: _____ Country: _____ Postal/ZIP Code: _____

Phone Number: _____ Cellular Number: _____ FAX Number: _____ E-mail Address: _____

Assistant's Name: _____

Submit this form by fax or email to the following:

The IMO
655 Bay Street, Suite 410
P.O. Box 1
Toronto, ON M5G 2K4
Attention: Market Relations Representative
Fax No.: (905) 403-6921
Subject: *Market Participant Contacts*

All information submitted in this process will be used by the *IMO* solely in support of its obligations under the "Electricity Act, 1998", the "Ontario Energy Board Act, 1998", the "Market Rules" and associated policies, standards and procedures and its *licence*. All submitted information will be assigned the appropriate confidentiality level upon receipt.

Terms and acronyms used in this Form that are italicized have the meanings ascribed thereto in Chapter 11 of the "Market Rules".

Organization Name: _____
Market Participant ID: _____

This form is to be used by the *market participant* to identify the contacts that are responsible for specific functions within their organization. If a specific contact type is not identified, all communications will be sent to the Main Executive Contact as identified in the "Application for Authorization to Participate".

PART 1 – CERTIFICATION

This section is to be signed by the individual identified as the 'Main Executive Contact' or the 'Full Access User' in the "Application for Authorization to Participate".

_____ Name	_____ Title
_____ Phone	_____ Signature

PART 2 – CONTACT TYPES

Select the appropriate contact type(s).

<input type="checkbox"/> Add Contact	<input type="checkbox"/> Remove Contact	<input type="checkbox"/> Change Contact Information
<input type="checkbox"/> 18M 10Y Forecast Assessment	<input type="checkbox"/> Meter Service Provider Trouble Report	
<input type="checkbox"/> Dispute Resolution	<input type="checkbox"/> Non-Compliance	
<input type="checkbox"/> Emergency Preparedness Plan	<input type="checkbox"/> Other 1	
<input type="checkbox"/> Energy Forward Market	<input type="checkbox"/> Other 2	
<input type="checkbox"/> Full Access User	<input type="checkbox"/> Prudential Requirements	
<input type="checkbox"/> Invoicing and Banking	<input type="checkbox"/> Reliability Compliance (RC)	
<input type="checkbox"/> Main Executive Contact	<input type="checkbox"/> Revenue Metering	
<input type="checkbox"/> Market Surveillance	<input type="checkbox"/> Settlement Statements and NOD	
<input type="checkbox"/> Market System Outage	<input type="checkbox"/> Transmission Rights Market	

Contact Information	
Contact Name:	<input type="text"/>
Position:	<input type="text"/>
Effective Date:	<input type="text"/>
End Date:	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
Province/State:	<input type="text"/>
Postal/Zip Code:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>
Comments:	<input type="text"/>

Submit this form by mail, courier or fax to the following:

The *IMO*
655 Bay Street, Suite 410
P.O. Box 1
Toronto, ON M5G 2K4
Attention: IMO Help Centre
Fax No: (905) 403-6921

Subject: *IMO* System Access and User Identification

All information submitted in this process will be used by the *IMO* solely in support of its obligations under the "Electricity Act, 1998", the "Ontario Energy Board Act, 1998", the "Market Rules" and associated policies, standards and procedures and its licence. All submitted information will be assigned the appropriate confidentiality level upon receipt.

Terms and acronyms used in this Form that are italicized have the meanings ascribed thereto in Chapter 11 of the "Market Rules".

Please complete one form per user. Identify user and assign *IMO* system access.

(User can be an employee, agent, consultant, or the Custodian for an API)

Note: This form is not necessary if you are applying for a digital certificate and have completed Section 3 of "IMO Certificate Subscriber Request" IMO-FORM-1276.

PART 1 – GENERAL INFORMATION

Market Participant Information

Market Participant Name:

Market Participant ID:

The following has the authority and certifies the accuracy of the User and the User's System Access information completed in the following pages:

<input type="text"/>	<input type="text"/>
Name (Please Print)	Title
<input type="text"/>	<input type="text"/>
Signature	Date

PART 1 – GENERAL INFORMATION

Mode of System Access:

Please indicate which mode of system access the user requires (Choose only one):

- Netscape Communicator
- MIM Client Application Program Interface (API)

If the MIM Client API is selected indicate:

Name of Application using the API: _____

Name of Server Application runs on: _____

NOTE:

Market Participants can interact with the Market Information Management (MIM) Internet Web site via one of the following methods:

1. The Netscape Communicator for individual users (default method); and/or
2. The MIM Client Application Programming Interface (API) for automated activities. The MIM Client API method allows participants to customize their interface to interact with the *IMO*. If the API method is used, a Custodian needs to be appointed from the participant organization to represent the application.

PART 2 – METER TROUBLE REPORTING & NOTICE OF DISAGREEMENT SYSTEMS

Would you like this user to have access to the *Meter* Trouble Reporting System? This enables:

- the *Metered Market Participant* (MMP) user to view *Meter* Trouble Reports (MTR) for their *meters*.
- the *Metering Service Provider* (MSP) to receive and process their *Meter* Trouble Reports.

Note: Previously access was given to the contact names submitted for 'Revenue Metering' and 'Meter Service Trouble Report' or defaulting to the 'Main Contact'. This will no longer be the case. Going forward this form will determine user access.

Yes, give this user access to the *Meter* Trouble Reporting System.

Would you like this user to have access to *Notice of Disagreement* System? This enables the *Market Participant* to submit a *Notice of Disagreement* relating to a *Preliminary Settlement Statement*.

Note: Previously access was given to the contact names submitted for 'Settlement Statements' or defaulting to the 'Main Contact'. This will no longer be the case. Going forward this form will determine user access.

Yes, give this user access to *Notice of Disagreement* System.

PART 3 – USER INFORMATION

User / Custodian Information	
Last Name: _____	
First Name: _____	Middle Name: _____
Telephone No.: _____	Fax No.: _____
E-mail Address: _____	

PART 4 – MARKET SYSTEMS

Please indicate in the box this user’s access rights for each of the following *IMO* systems. Refer to your original “Application for Authorization to Participate” to confirm your selection.

<input type="checkbox"/> Physical Market: Real Time Energy	<input type="checkbox"/> Physical Market: Real Time Energy	<input type="checkbox"/> Physical Market: Operating Reserve	<input type="checkbox"/> Financial Market: Transmission Rights	<input type="checkbox"/> Financial Market: Energy Forward Market (Deferred Market)
<ul style="list-style-type: none"> • <i>Meter Information</i> 	<ul style="list-style-type: none"> • Reports • <i>Bids and Offers</i> (Dispatchable only) • Schedules and Forecasts • <i>Settlement Statements</i> • <i>Invoices</i> 	<ul style="list-style-type: none"> • Reports • <i>Bids and Offers</i> (Dispatchable only) • <i>Settlement Statements</i> • <i>Invoices</i> 	<ul style="list-style-type: none"> • Reports • <i>Bids and Offers</i> • <i>Settlement Statements</i> • <i>Invoices</i> 	<ul style="list-style-type: none"> • Reports • <i>Bids and Offers</i> • <i>Settlement Statements</i> • <i>Invoices</i>

PART 5 – PARTICIPANT LIFECYCLE SYSTEM (PLC)

Would you like this user to have access to the Participant Lifecycle System (PLC) for verifying authorization and *facility* registration data?

Note: Currently only the ‘Full Access User’, as indicated on the “Application for Authorization to Participate”, has this access.

Yes, give this user access to the PLC



IMO CERTIFICATE SUBSCRIBER REQUEST FORM – SECTION 1

(to be submitted to and/or retained by the IMO LRA Officer)

All information submitted in this section will be used by the IMO, and processed by the certification authority services supplier, solely in support of its obligations under the *Electricity Act, 1998*, the *Ontario Energy Board Act, 1998*, the *Market Rules* and associated policies, standards and procedures and its licence. All information submitted will be assigned a *Participant Confidential* classification upon receipt where applicable.

1	Indicate Type of Certificate Transaction Request <input type="checkbox"/> Initial Issuance & System Access <input type="checkbox"/> Key Recovery <input type="checkbox"/> Final Revocation & Removal of System Access <input type="checkbox"/> Revocation & Reissue <input type="checkbox"/> Change	1a	User Serial # _____ <small>(to be supplied by IMO LRA officer after receipt of request for Initial Issuance and recorded for future reference between Certificate Subscriber and IMO LRA Officer)</small>
		1b	Replaces Serial # _____
Reason for Transaction Request: _____			

For Initial Issuance, indicate mode of use: Browser by Individual API by Application (Custodian) Limited Group/Role (pick one)

2 **Certificate Subscriber Information**
 Company Name: _____ Company ID Number (PLC MP ID): _____

3a **Individual's Information** (where certificate is used with standard web-browser (i.e. Netscape))
 Individual's Last Name: _____
 First Name: _____ Middle Name: _____
 Individual's Bus. Phone No.: _____ Individual's Bus. Email Address: _____

3b **Application or Limited Subscriber/Custodian's Information** (where certificate is used with the MIM Application Programming Interface (API) for automated activities) or where certificate is to be used for limited system access and distributed among more than one user.
 Application or Limited Subscriber's Group /Role Name Attribute 1: _____
 Application or Limited Subscriber's Group / Role Name Attribute 2: _____
 Custodian's First Name: _____ Custodian's Last Name: _____
 Custodian's Business Phone No.: _____ Custodian's Bus. Email Address: _____

4 **Certificate USERID:** _____
 (IMO Use Only - PLC User Login ID @ Subscriber's Company Constant Short Name from the IMO PLC System)
 Information required for Certificate USERID extension is sourced from PLC/IMO Market Entry. To be filled in by IMO LRA Officer and confirmed with Market Entry.

5 **Declaration of Certificate Subscriber Authorized Signatory**
 The Certificate Subscriber solemnly declares that the information contained in this request is true and has read, understood, and accepts the responsibilities, obligations and liabilities with the use of the IMO Digital Certificate as described in the IMO Certificate Subscriber Agreement and where applicable has approved the issuance or revocation of a digital certificate for the identified Individual, Application or Limited Subscriber Custodian.
 _____ at _____
 Signature of Authorized Signatory of Certificate Subscriber Title of Authorized Signatory City/Province Date/Time

6 **Declaration of:** Certificate Subscriber Registration Officer / IMO LRA Officer / Notary Public
 To be filled in for Issuance, Change where Individual's Name or Custodian Change has occurred (please check only one of above)
 I solemnly declare I have verified the identity of the subject Individual or Custodian based on the requirements of this Request Form's Section 2.
 _____ at _____
 Name of Certificate Subscriber Registration Officer/IMO LRA Officer/Notary Public (Print) Signature of Certificate Subscriber Registration Officer/IMO LRA Officer/Notary Public City/Province Date/Time

7a	Declaration of Certificate Subscriber Registration Officer I solemnly declare that, I have reviewed the information contained in this request and that to the best of my knowledge it is true. _____ Name of CSR Officer (Print) Signature of CSR Officer at _____ City/Province Date/Time	7b	Declaration of IMO LRA Officer (IMO use only) I solemnly declare that, I have reviewed the information contained in this request with the Certificate Subscriber and / or Notary Public where applicable and that to the best of my knowledge it is true. _____ Name of IMO/LRA Officer (Print) Signature of IMO LRA Officer at _____ City/Province Date/Time
----	--	----	---

The MIM Client API method allows participants to customize their interface to interact with the IMO. If the API or Limited Group/Role mode is used, a Custodian needs to be appointed from the participant organization to represent the application or Limited Subscriber Group/Role.

MV-WEB Access using Netscape Browser

- PKI Digital Certificate required to the MIM interface
- Metering data can be viewed/downloaded up
- to last dispatch day
- Suitable for small file download
- Suitable for few metering installations
- Applicable for MMPs and MSPs

VPN Token Access

- Virtual Private Network via FTP session
- Suitable for users with large numbers of DPs and MPs
- Batch processing - upload request file/download EDI file
- IMO Market Services will process VPN request
- VPN client software and token diskette issued
- User ID and password