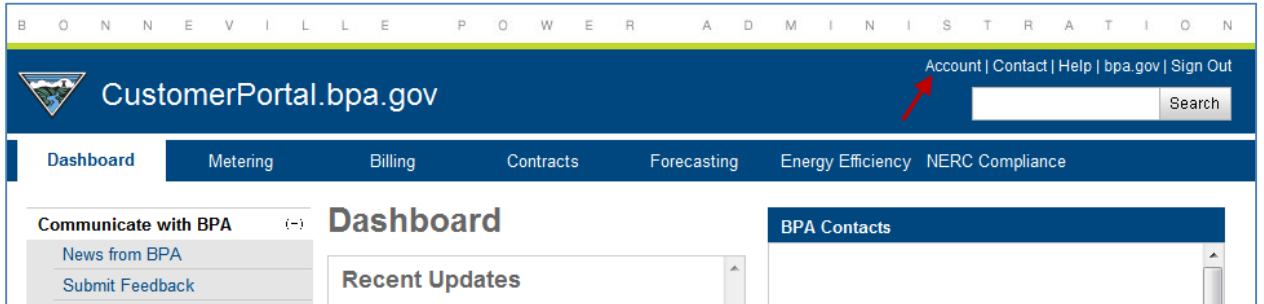


How to Request a New User

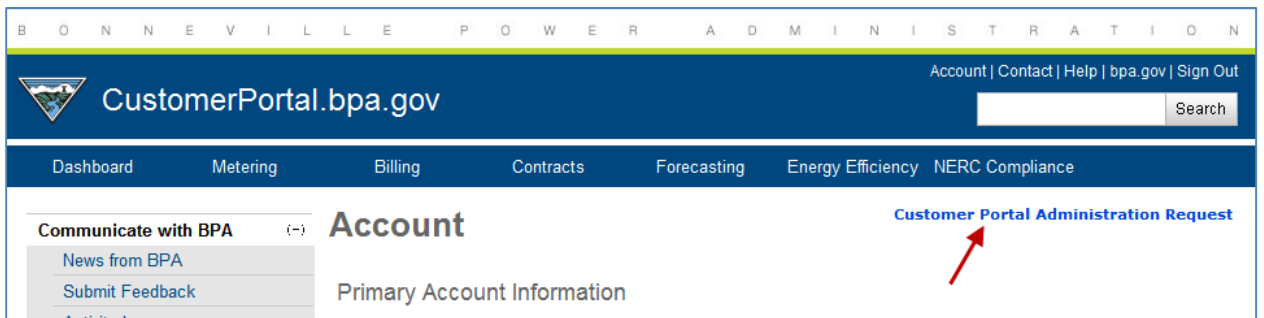
A New Customer Portal User Request must come from a Designated Customer Administrator. A New User Request can be submitted by either the New User Request Form in Customer Portal or by email to bpacustomerportal@bpa.gov.

New User Request Form in CP:

1. Log into Customer Portal <https://customerportal.bpa.gov>
2. Select **Account** in the top right hand corner.




3. Select the link to **Customer Portal Administration Request**.



4. Under the **Subject** drop down, select **Customer Portal – Create New User**.

B O N N E V I L L E P O W E R A D M I N I S T R A T I O N

Account | Contact | Help | bpa.gov | Sign Out

 CustomerPortal.bpa.gov Search

Dashboard Metering Billing Contracts Forecasting Energy Efficiency NERC Compliance

Customer Portal Administration Request

Communicate with BPA (→)

- News from BPA
- Submit Feedback
- Activity Log
- Customer Account Team

Tools & Resources (→)

- Search
- Event Calendar
- Links
- Manage Alerts
- Wind Power Forecast

Learn More (→)

- Customer Portal Training
- About Customer Portal Data

Need Help? (→)

- FAQs

REQUEST DETAILS

Entity Name:

Submitted by:

Subject:

- Customer Portal Question or Comment
- Customer Portal Question or Comment
- Customer Portal - Create New User**
- Customer Portal - Request Account Updates
- Customer Portal - Request Password Reset
- Customer Portal - Request Existing User Updates

ATTACHMENTS

Attach a File:

Click here to attach a file

Submit Clear

Request Forms

- Submit a Billing Request
- Submit a Compliance Request
- Submit a Contract Request
- Submit a Forecasting Request
- Submit a Metering Request
- Submit Customer Portal Feedback
- Suggest a Reliability Matters Topic

- Once the **Create New User** subject is selected, the New User Request Form will appear. Fill out the User's Information and User Type. Then, select **Yes** or **No** for all **Assign Permissions** questions. The first question 'User can view, download, and print...' is Standard Access.



Search

Communicate with BPA (-)

- News from BPA
- Submit Feedback
- Activity Log
- Customer Account Team

Tools & Resources (-)

- Search
- Event Calendar
- Links
- Manage Alerts
- Wind Power Forecast

Learn More (-)

- Customer Portal Training
- About Customer Portal Data

Need Help? (-)

- FAQs

Customer Portal Administration Request

REQUEST DETAILS

Entity Name:

Submitted by:

Subject:

Date Submitted: High Importance

Description:

Request Forms

- Submit a Billing Request
- Submit a Compliance Request
- Submit a Contract Request
- Submit a Forecasting Request
- Submit a Metering Request
- Submit Customer Portal Feedback
- Suggest a Reliability Matters Topic

REQUEST USER UPDATES

Create User

*If you require assistance with completing this form please contact the BPA Customer Portal Team at 503-230-4246.

First Name:

Last Name:

Email Address:

User Type

Is this user a Third Party Agent or Customer Portal Administrator?

No Third Party Agent Customer Portal Administrator

Assign Permissions

User can view, download, and print: Bills, Meter Points and Diagrams, Load and Resource Forecast Data, Contracts, Contact Information, NERC Compliance Standards and documentation, and Energy Efficiency (EE) invoice activity.

No Yes
Submit Energy Efficiency Invoices?

No Yes
Submit Load and Resource Forecast Updates?

No Yes
Manage/Support NERC Compliance with BPA?

No Yes
View Fiber & Wireless Contracts?

No Yes
SOC Restrictions Apply?

This employee performs a Marketing Function as defined in the FERC Standards of Conduct. These Standards of Conduct govern the relationships between regulated Transmission Providers and all of their Energy Affiliates.

Marketing Function involves the sale for resale in interstate commerce, or the submission of offers to sell in interstate commerce, of electric energy or capacity, demand response, virtual transactions, or financial or physical transmission rights, all as subject to an exclusion for bundled retail sales, including sales of electric energy made by providers of last resort (POLRs) acting in their POLR capacity. Marketing function does not involve the purchasing of these commodities.

Marketing Function Employee (MFE): An employee, contractor, or agent who actively and personally engages on a day-to-day basis in marketing functions. Simply put, Marketing Function Employees are those who sell energy or capacity or remarket transmission rights in the marketplace.

Notes:

Add or Update Another User

ATTACHMENTS

Attach a File:

Submit Clear

All requests on this form must come from a designated portal administrator.

6. Once all of the information has been filled out, click **Submit** at the end of the form. A BPA Customer Portal Administrator will be responding to your request by email.

By Email:

1. Send an email to BPA Customer Portal (bpacustomerportal@bpa.gov) with the New User's
 - a. First and Last Name,
 - b. Email Address,
 - c. Whether the user is a Third Party Agent or not,
 - d. Whether the user is a Marketing Function Employee or not, and
 - e. Level of Access.

Level of Access

Standard

Users with this permission level are **allowed** to view, download and print bills, meter point information, usage, and diagrams, load and resources forecasts, contracts, energy efficiency reimbursement activity, and NERC Compliance standards and documentation. Users with this permission level are **not allowed** to view Fiber and Wireless contracts or submit data through the portal including load or resource forecast data, or energy efficiency files.

EE Submit

Users with this permission level have all permissions applied at the Standard level **plus** the permission to submit energy efficiency files through the portal.

Load Forecast Editor

Users with this permission level have all permissions applied at the Standard level **plus** the permission to submit load and resource forecast updates through the portal.

NERC Compliance

Users with this permission level have all permissions applied at the Standard level **plus** the permission to manage and support NERC Compliance with BPA.

Fiber and Wireless Contract Access

Users with this permission level have all permissions applied at the Standard level **plus** the permission to view Fiber and Wireless contracts.

SOC Restricted

Users with this permission level are restricted from accessing content that BPA has deemed as SOC sensitive. Typically, these restrictions apply to users that are performing a marketing function role within your utility. *Note: This user performs a Marketing Function as defined in the FERC Standards of Conduct. A Marketing Function Employee (MFE) can be any employee, contractor, or agent who actively and personally engages on a day-to-day basis in selling energy or capacity or remarketing transmission rights in the marketplace.