



Communities Roadmap

As of July 24, 2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Membership Management Community: Contact Management				◆ Member Feedback			■	◆ Production Go-Live				

Legend

- Start Date
- ◆ End Date



- Solar and Wind data from Data Viewer [Full Q&A](#)
- Capacity Exchange XML Samples Now Available [Full Q&A](#)
- Will the operational data be still available in the current link after August 2018?
<http://www.pjm.com/pub/account/Impgen/Impppost.html>

Any plan to have it in data miner 2? [Full Q&A](#)

- Requesting Access to PJM Connect PERCS Secure SharePoint Site – [See Article](#)
- Request Demand Bid Services using PJM's Member Community – [See Article](#)
- PJM EMS Networking Rapid Response Team Procedure – [See Article](#)
- How do I change my member billing contact information? – [See Article](#)

Before



Phone



PJM.com/
PJM Tools



E-Mail



Internal PJM Teams



After

Contact Managers



Internal PJM Teams



Instituting a *member-managed* Contact Management tool provides the following:

- Enhanced security by establishing Contact Managers
- Transparent and centralized process
- Easy to maintain
- Managed by members who know their data best
- Improved data quality
- Flexible such that new roles can be identified and added in the future
- Not replacing Account Manager provisioning functionality

- Contact Managers responsible for creating contacts and assigning roles
- Contact Attributes:
 - First and Last Name
 - Title
 - Employer, if different than Member
 - Phone Number & Alternate Phone Number
 - Phone Type (e.g., cell, office, other)
 - Individual Email
 - Group Email (optional)
 - Preferred Email Indicator (required only if both emails are provided)
- Required Roles: A primary contact and at least one alternate contact must be designated

Required Roles

- Roster Manager (new)
- Billing*
- Credit*
- Officer Certification Form
- Legal (new)
- Officer of the Company
- Authorized Representative (new)
- Information Technology (new)

Optional Roles

- Treasury*
- Communications/Public Relations*
- Compliance*
- Audit

* Prepopulated with existing contacts

- Roster Manager role will be identified in Contact Management.
- Roster Managers will then be set up by PJM in Voting tool.
 - Authority to create and maintain rosters for all PJM stakeholder groups
 - Transparent and centralized process
 - Easy to maintain
 - Managed by members who know their data best
 - Improved data quality and validation
 - Easy and efficient process to add single meeting proxy voters

- Contact Managers have authority to maintain information in Membership Management Community
- Full Members need to designate Contact Managers
 - Form available on Membership Management Community tools page
 - Form distributed with email request for annual affiliate disclosures
- Membership Management Community updates will be provided at the Tech Change Forum

Appendix

Role	Definition
Roster Manager	The Roster Manager will have authority to update all stakeholder group rosters in PJM's Voting application for the member company.
Billing	The Billing Contact is responsible for the disposition of PJM's invoices (retrieve from MSRS, process for payment, respond to payment inquiries, i.e. breach notices, payment default notices, etc.).
Credit	The Credit Contact is authorized to participate in activities related to collateral calls.
Officer Certification Form	The Officer Certification Form contact will receive notification annually regarding the Officer Certification Form.
Legal	The Legal Contact is authorized to address questions regarding PJM legal agreements. The Legal Contact may be the member company's counsel or legal contact.
Officer of the Company	An Officer of the Company that has the authority to sign PJM official documents and agreements binding the member company.

Role	Definition
Authorized Representative	The Authorized Representative has the authority to sign PJM official documents and agreements binding the member company.
Information Technology	The Information Technology Contact is the main contact for any PJM technology related issues. In addition to established email distribution lists, change coordination notifications will be sent to the Information Technology contacts to ensure members receive information.
Treasury	The Treasury Contact is authorized to provide and answer questions regarding banking information.
Communications/ Public Relations	The Communications/Public Relations Contact handles communications and public relations for the member company.
Compliance	The Compliance Contact is a Reliability Compliance contact for the member company. If a member company is a NERC registered entity, a contact must be assigned to this role.
Audit	The Audit Contact is used for verifying distribution of SSAE audit report and bridge/gap letters. The Audit Contact must work for the member or be a certified agent for the member. The Audit Contact cannot be an auditor from an external firm.



Product Details

The [Member Community](#) allows members to find answers to their questions, get the information they need when they need it, and resolve issues quickly and efficiently.

Key Product Features

- Research topics quickly and easily
- Submit questions, issues and requests to PJM
- Track the real-time status of your requests
- Initiate various processes for demand bid, generation transfers, etc.

The [Tech Change Forum Community](#) allows users to find information and collaborate with other users and PJM subject matter experts about PJM's tools and initiatives. Discussions are based on topics covered within the monthly Tech Change Forum meetings.

Key Product Features

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM

The [Planning Community](#) will allow Transmission and Generation Owners to find information and collaborate with other users and PJM subject matter experts about Planning initiatives, proposal windows and process questions. Discussions are based on Planning topics.

Key Product Features

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM

The [Membership Management Community](#) will allow companies to submit application information for PJM membership and maintain member level contact information.

Key Product Features

- My Membership
 - Track the real-time status of your membership application
 - Submit documentation for application
- Contact Management
 - Maintain member level contact information for certain roles identified by PJM