Membership Management Community
Contact Manager Education

Knowledge Management Center

October 3rd, 2018

October 15th, 2018

My Membership: A new easy to use online membership enrollment process.

Available now

Contact Management: A “one stop shop” for members to maintain member level contact information for their company.

Roster Manager | Billing | Treasury | Credit | Legal | Authorized Representative | IT

Available now

PJM's new Contact Management feature in the Membership Management Community was released on August 30th.

- Access to the new feature is provided to Contact Managers for each member.
- Contact Managers can use the new feature to review and provide contacts for certain member level roles that have been identified by PJM.
- Updates to Credit, Treasury, and Billing contacts now done in Membership Management Community
- Does not replace any Account Manager provisioning functionality

Contact Manager Responsibilities

- Maintain up-to-date information in system
- Work within your company to identify the right people for the roles
  - Helps PJM increase engagement in PJM activities and communicate to the right people at your company
- Login prior to October 31st and provide contacts for required roles

Full Member Roles

Required Roles	Optional Roles
• Roster Manager (new) • Billing* • Credit* • Officer Certification Form • Legal (new) • Officer of the Company • Authorized Representative (new) • Information Technology (new)	• Treasury* • Communications/Public Relations* • Compliance* • Audit

* Prepopulated with existing contacts

Member Roles

Home | My Membership | Contact Management | Communities

Contact Management

Export: CSV

Role Definitions PDF

Contact Manager Attestation Form PDF

Create a Case

To export the data, select the Export: CSV link on the Member Roles, Unassigned Member Roles, or Contacts tab.

Create contacts and/or assign contacts to roles.

Create & Assign

Select the Member Roles tab to view role assignments.

MEMBER ROLES | UNASSIGNED MEMBER ROLES | CONTACTS

Search by last name or first name.

Actions	Last name	First name	Member	Role	Type
	Search	Search	All	All	All
	Contact	John	Voting Member 2	Authorized Representative	Alternate
	Duck	Donald	Voting Member 2	Authorized Representative	Alternate
	Smith	John	Voting Member 2	Authorized Representative	Alternate
	Contact	Marty	Voting Member 2	Billing	Primary
	Mouse	Mickey	Voting Member 2	Billing	Alternate

Edit or Delete role assignments.

Unassigned Member Roles

Home | My Membership | Contact Management | Communities

Contact Management

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Create & Assign

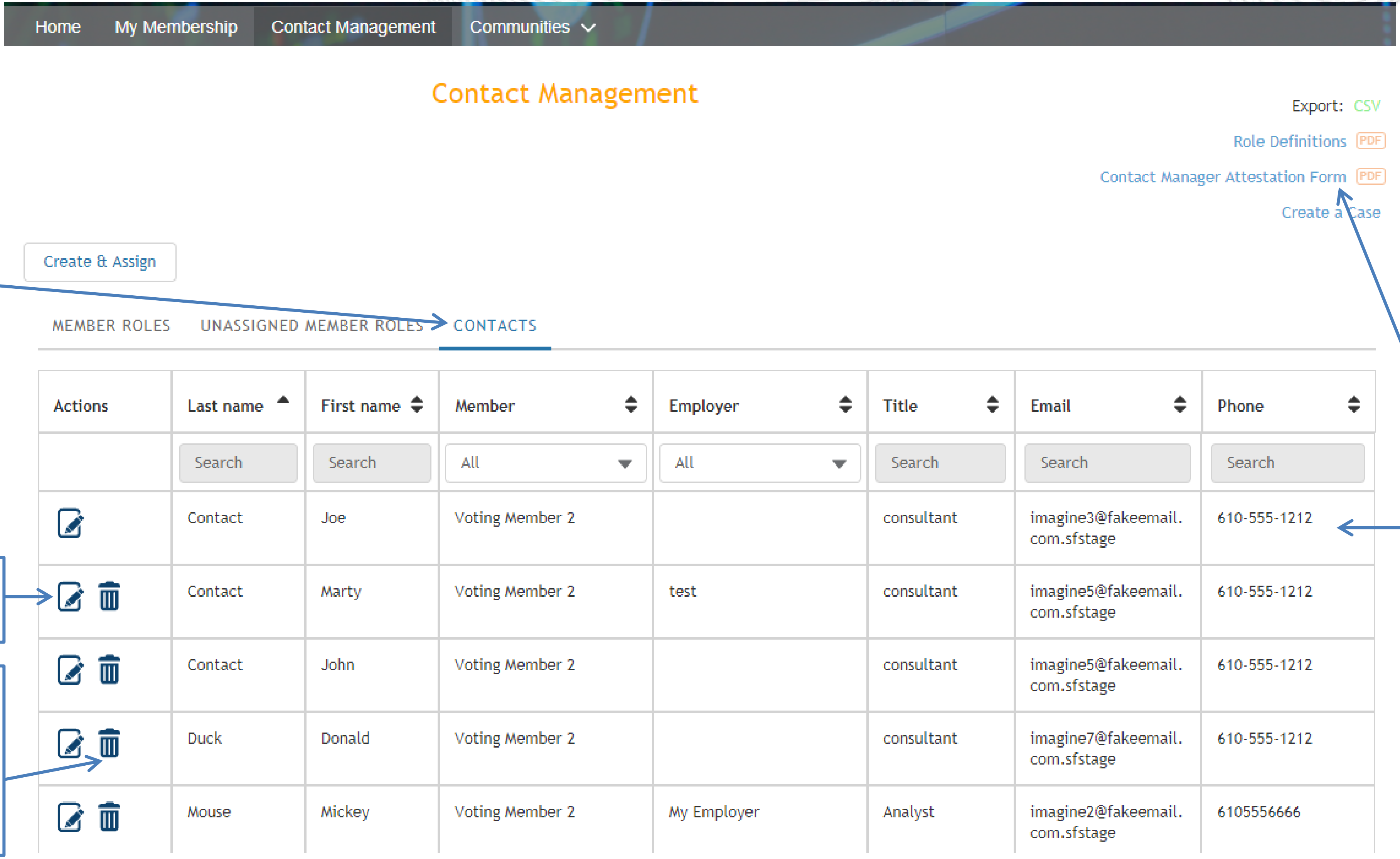
MEMBER ROLES | UNASSIGNED MEMBER ROLES | CONTACTS

Member	Role	Type
Voting Member 2	Audit	Alternate
Voting Member 2	Audit	Primary
Voting Member 2	Authorized Representative	Primary
Voting Member 2	Communications/Public Relations	Alternate
Voting Member 2	Compliance	Alternate
Voting Member 2	Credit *	Primary
Voting Member 2	Information Technology *	Primary
Voting Member 2	Legal *	Primary
Voting Member 2	Legal *	Alternate

Select the Unassigned Member Roles tab to view roles that haven't been assigned.

Asterisk denotes required roles.

Select the Contacts tab to view all contacts.

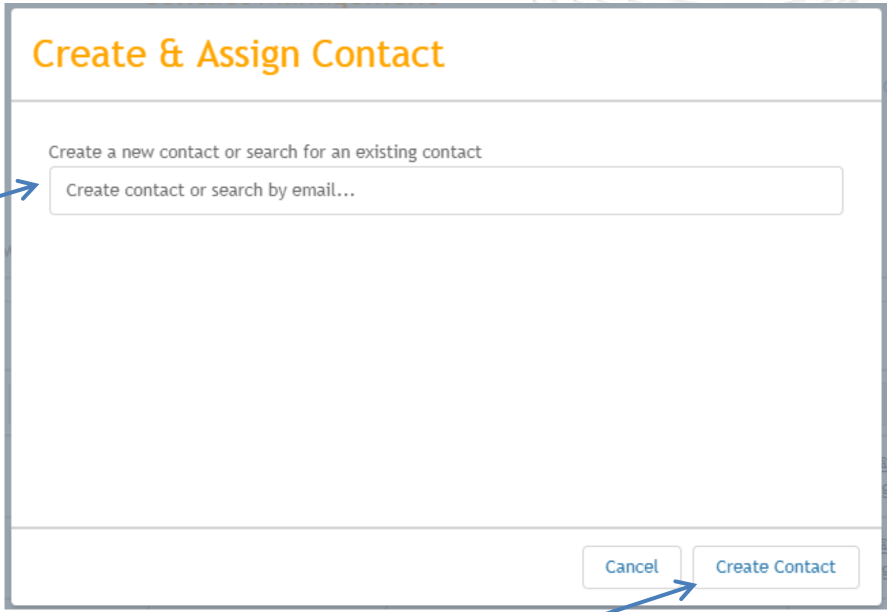


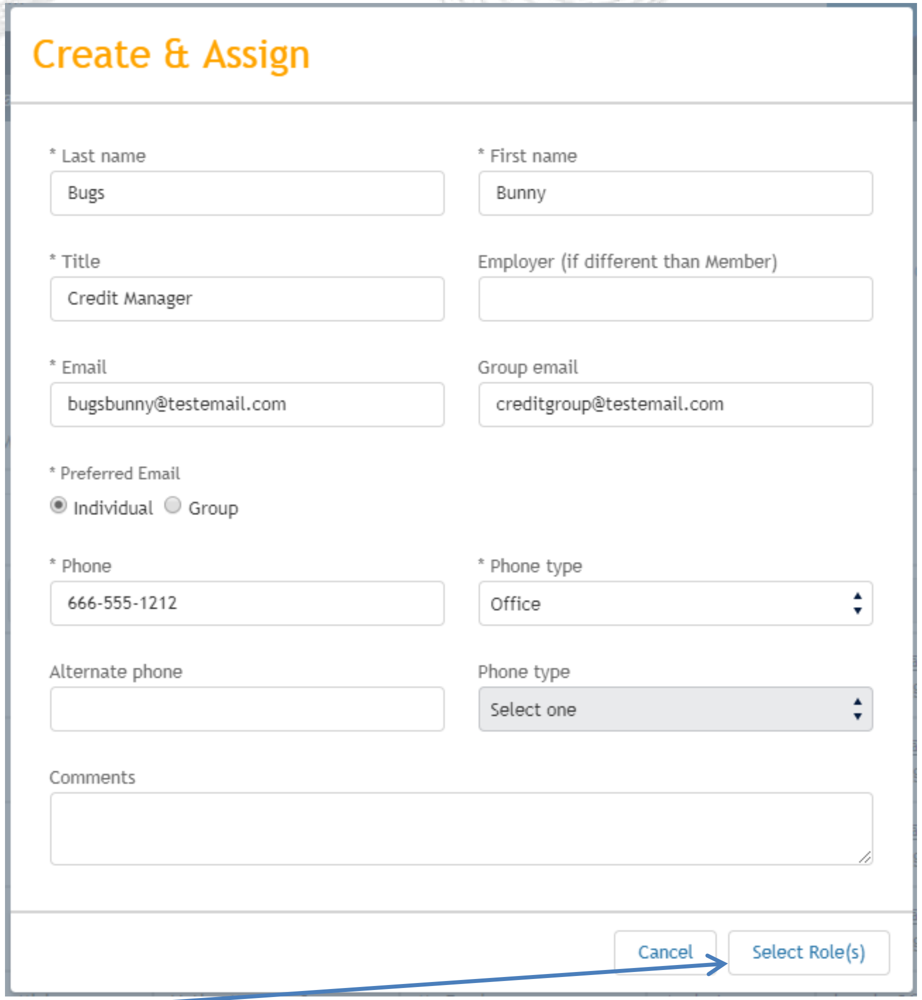
Contacts that do not have a delete button are designated Contact Managers and can only be removed by submitting a new Attestation Form.

Edit contact information

Delete all roles for a contact and if applicable, remove the contact from your company

Create & Assign Contact





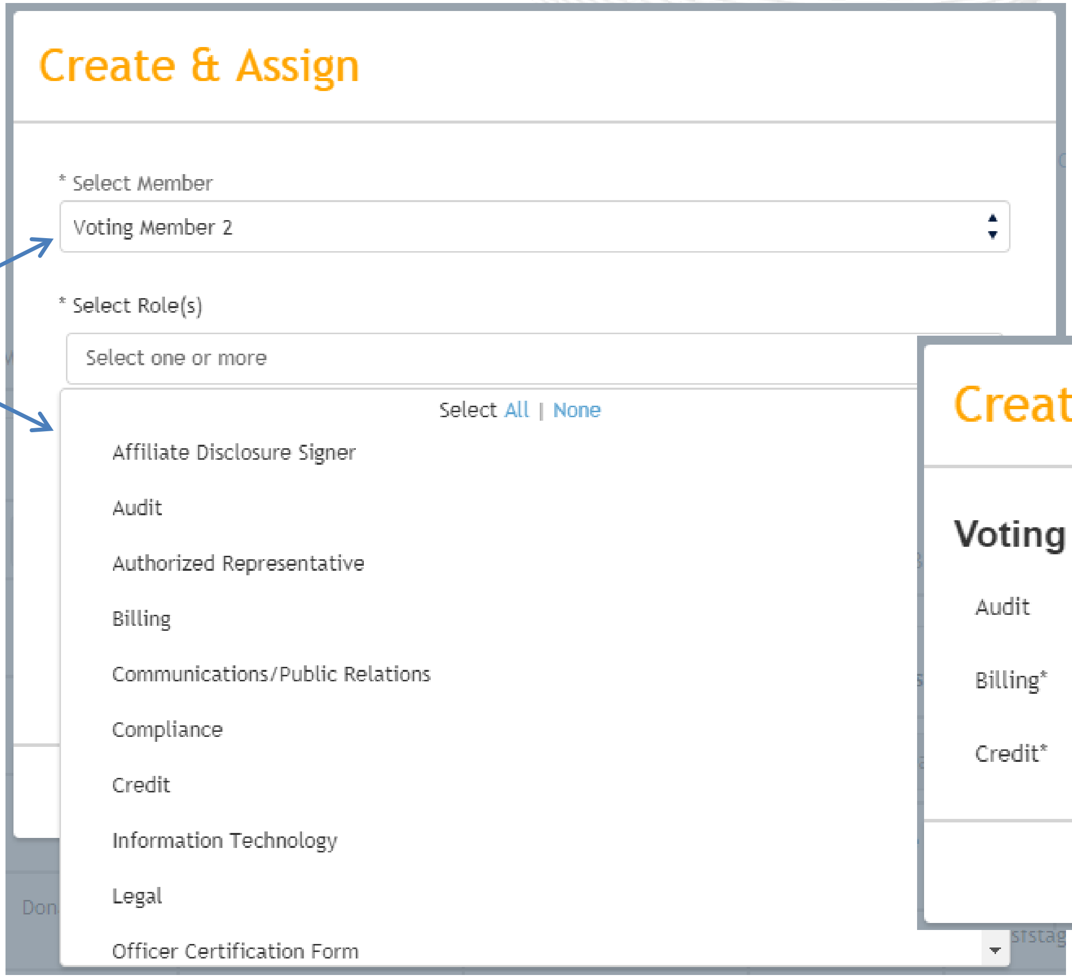
Type in the text box to search for an existing contact. If the contact exists, select View Contact, then click on Select Role(s).

If contact does not exist, select Create Contact

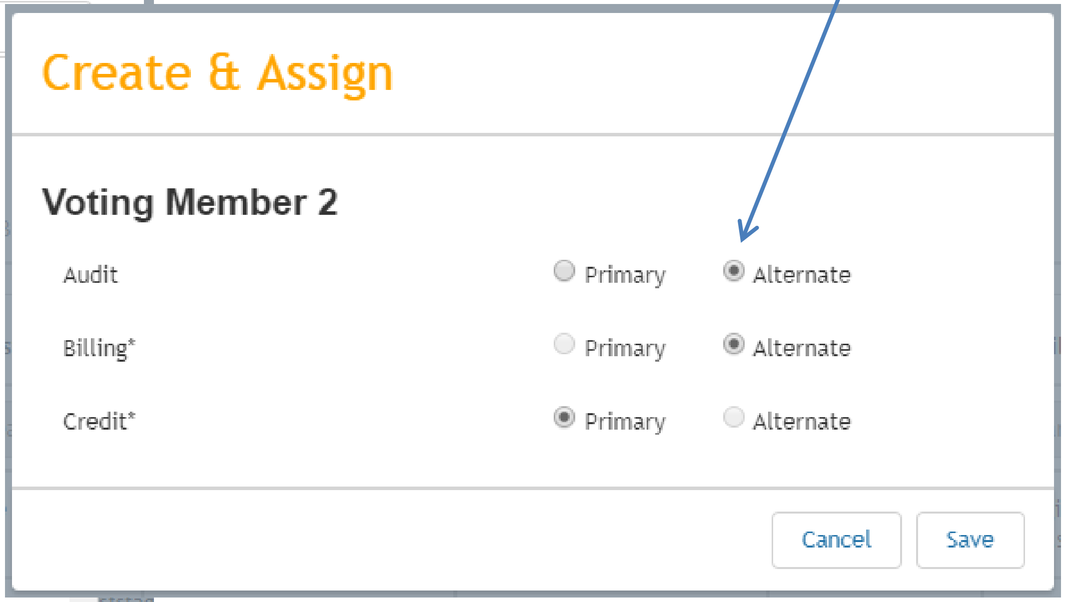
Fill in all required fields, click on Select Role(s)

Create and Assign Contact

After clicking Select Role(s), select member company from drop down, select all roles that apply, then select Assign Role(s).



To assign roles, select Primary or Alternate for each role. Click Save.



- Membership Management Community Tools Page
  - Contact Management User Guide
  - Contact Management Quick Guide
  - Contact Manager Attestation Form
- Tech Change Forum – Contact Manager Educations Sessions
  - Wednesday October 3rd 11 – 12 EPT
  - Monday, October 15th 11 – 12 EPT
- Questions?
  - Please contact membershipforms@pjm.com
  - PJM Customer Service: (610) 666-8980 / (866) 400-8980

- PJM will review Contact Management FAQs
- Questions?

Appendix

Role Definitions

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 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 Definitions

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.