

Roster Manager User Guide



June 2022



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Overview

The Contact Management feature in the Membership Management Community was established in 2018 and is designed to make it easier for Members to manage who is representing their company for various member-level roles at PJM. Contact Managers are responsible for creating contacts and assigning roles for their organization. One of the required roles in the Contact Management feature is the Roster Manager role.

Roster Managers have the authority to create and maintain rosters for all open PJM stakeholder groups. Roster Managers will maintain the rosters for their assigned Member companies in the Voting Application (voting.pjm.com).

Requesting Access

Each identified Roster Manager will need the required access, Voting Roster Administrator assigned to their user account in Account Manager in order to access the Roster Manager feature in the Voting Application. This access will need to be approved by your company Customer Account Manager (CAM) in Account Manager.

Once access is granted, PJM will receive notification and establish the Roster Managers in the Voting Application. Designated Roster Managers can sign in to the Voting Application by navigating to voting.pjm.com

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Roster Managers

Roster Managers will maintain Member rosters, for which they are designated, in the Voting Application. A tab will be visible to all Roster Managers in the Voting Application.

- **Contacts:** Displays all existing contacts who can be added to a roster
 - **New Contact** – will allow for a Roster Manager to create a new contact; the application will not allow for duplicate contacts to be created with the same email address

1. Navigate to the Roster Manager.

3. Click on New Contact.

The screenshot shows the 'Contacts' page in the Voting Application. The 'Roster Manager' tab is selected in the top navigation bar. The 'Contacts' subtab is highlighted with a dashed orange box. The 'New Contact' button is also highlighted with a dashed orange box. The main content area displays a table of contacts with columns for Voting User Name, Last Name, First Name, and Email Address. The table contains 20 rows of contact information.

Voting User Name	Last Name	First Name	Email Address
	Abakirov	Janybek	janybek.abakirov@brookfieldrenewable.com
	Abate	Stephen	sabate@duqlight.com
	Abbott	Tim	tim.abbott2@duke-energy.com
	Abdur-Rahman	Mushin	muhsin.abdur-rahman@vistracorp.com
JAbebe1	Abebe	Jonathan	jabebe@cleanlineenergy.com
amabe001	Abed	Abbas	amabed@innergex.com
	Abel	Kyle	kyle.abel@aes.com
	Abend	Erik	erik.abend@energyevolutionnews.com
	Abing	Benjamin	babing@tctransco.com
	Aboudaher	Omar	Omar.aboudaher@bp.com
abr_affirmed	Abram	Benjamin	ben@affirmed.energy
Acegan81	Acegan81	Amanda	acegan81@test.com
AceTest	AceTest	Amanda	AceTest@pjm.com
	Adams	Thomas	tadams@lcswwa.org
V_SAdams	Adams	Steven	steve.adams@suezenergyna.com

2. Click on the Contact subtab.

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4. The Create Contact Dialog Box will appear.

5. Enter the Contact Information into the fields.

The screenshot shows a 'Create Contact' dialog box. At the top left, the text 'Create Contact' is highlighted with a dashed orange box. Below this is a section titled 'Contact Info' with a blue header. This section contains six input fields: 'First Name *', 'Middle Initial', 'Title', 'Last Name *', 'Phone Number *', and 'Email Address *'. The 'Save' button at the bottom right is also highlighted with a dashed orange box. An orange line connects the 'Save' button to the instruction '6. Click Save.' below the dialog box.

6. Click Save.

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Request Contact Change – will allow for a Roster Manager to submit contact information changes – all comments are sent to the Voting Support team to manually update the requested contact information change.

1. Navigate to the Roster Manager tab.

The screenshot shows the Roster Manager interface. The 'Roster Manager' tab is highlighted in the top navigation bar. The 'Contacts' subtab is selected in the left sidebar. The 'Request Contact Change' button is highlighted in the top right of the main content area. The main content area displays a table of contacts with columns for User Name, Last Name, First Name, and Email Address. The table contains 15 records.

Voting	User Name	Last Name	First Name	Email Address
		Abakirov	Janybek	janybek.abakirov@brookfieldrenewable.com
		Abate	Stephen	sabate@duqlight.com
		Abbott	Tim	tim.abott2@duke-energy.com
		Abdur-Rahman	Mushin	muhsin.abdur-rahman@vistracorp.com
Jabebe1		Abebe	Jonathan	jabebe@cleanlineenergy.com
amabed001		Abed	Abbas	amabed@innnergex.com
		Abel	Kyle	kyle.abel@aes.com
		Abend	Erik	erik.abend@energyevolutionnews.com
		Abing	Benjamin	babing@itctransco.com
		Aboudaher	Omar	Omar.aboudaher@bp.com
abr_affirmed		Abram	Benjamin	ben@affirmed.energy
Acegan81		Acegan81	Amanda	acegan81@test.com
AceTest		AceTest	Amanda	AceTest@pjm.com
		Adams	Thomas	tadams@lcswwma.org
V_Adams		Adams	Steven	steve.adams@suezenergyna.com

3. Click Request Contact.

2. Click on the Contact subtab.

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4. The Request a Contact Change dialog box.

Request a Contact Change

Comment

Enter updated contact information ...

500 characters remaining

Submit Cancel

Erik

5. Enter updated contact information in the Comment field.

6. Click Submit.

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- **Creating/Editing a Roster** – will allow for the Roster Manager to select to add a Single Roster, Multiple Rosters or Duplicate Roster.

- **Single Roster**

1. Navigate to the Roster Manager tab.

2. Click on the Roster subtab.

3. Click on Create button.

4. Select Single Roster.

ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
104566	Acegan81	Amanda			Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104567	AceTest	Amanda	51640	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104568	ageantest	Amanda	70349	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104569	dtmigrate	Debbie	70345	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104582	Acegan81	Amanda	70346	CPSTF	Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104583	AceTest	Amanda	51640	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104584	ageantest	Amanda	70349	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104585	dtmigrate	Debbie	70345	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104597	Acegan81	Amanda	70346	DRS	Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104598	AceTest	Amanda	51640	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104599	ageantest	Amanda	70349	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104600	dtmigrate	Debbie	70345	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104621	Acegan81	Amanda	70346	MMUJAC	Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104622	AceTest	Amanda	51640	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104623	ageantest	Amanda	70349	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104624	dtmigrate	Debbie	70345	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104637	Acegan81	Amanda	70346	HSS	Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104638	AceTest	Amanda	51640	HSS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104639	ageantest	Amanda	70349	HSS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104640	dtmigrate	Debbie	70345	HSS	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]
104653	Acegan81	Amanda	70346	TC1	Exelon Business Services Company, LLC	Primary	06/07/2022	[Checkmark] [X]
104654	AceTest	Amanda	51640	TC1	Exelon Business Services Company, LLC	Alternate	06/07/2022	[Checkmark] [X]

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5. The Create Roster dialog box will appear.

6. Select the Member Name, Contact, Committee and Roster Type.

The screenshot shows a 'Create Roster' dialog box. The title bar is labeled 'Create Roster'. Below it is a section titled 'Roster Info'. This section contains four fields: 'Member Name' with a dropdown menu showing 'Exelon Business Services Company, LLC', 'Contact' with an empty text input, 'Committee' with a dropdown menu showing 'ARR FTR Market Task Force', and 'Roster Type' with a dropdown menu showing 'Primary'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

7. Click Save.

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8. A success message will appear and the record will be at the top of the Roster Screen list.

The screenshot shows the Roster Manager interface. At the top, there are tabs for 'Voting', 'Registration Details', and 'Roster Manager'. A green success message banner is displayed, stating 'Success: Successfully saved Roster ID:104541'. Below the banner, there are navigation options: 'Contacts', 'Roster', 'Roster Requests', and 'Designates'. There are also buttons for 'Active Rosters Only', 'Refresh', 'Reset Filters', 'Create', 'Advanced Reporting', and 'Bulk Terminate Rosters'. A table below shows the roster details for the saved record.

Select	ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
<input type="checkbox"/>	104541	Tester	Voting	70522	AFMTF	Exelon Business Services Company, LLC	Alternate	06/06/2022	

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Adding Multiple Rosters

1. Navigate to the Roster Manager tab.

3. Click on Create.

2. Click on the Roster subtab.

4. Click Select Multiple Rosters.

The screenshot shows the Roster Manager interface. At the top, there are tabs for Voting, Registration Details, and Roster Manager. Below these are sub-tabs for Contacts, Roster, Roster Requests, and Designates. The Roster subtab is selected. On the right side, there are buttons for Create, Advanced Reporting, and Bulk Terminate Rosters. The main area contains a table with columns for ID, Last Name, First Name, Contact ID, Committee, Member Name, Roster Type, Effective Date, and Actions. The table lists 19 records. At the bottom, there are pagination controls showing 15 records per page and 281 records total.

ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
104722	AceTest	Amanda	70346	IPRTF	Exelon Generation Company, LLC	Primary		
104723	ageantest	Amanda	51640	IPRTF	Exelon Generation Company, LLC	Alternate		
104724	dtmigrate	Debbie	70349	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
104732	Seibel	August	70345	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
104733	Bush	Doug	64586	IPRTF	IMG Midstream LLC	Primary	06/08/2022	
104734	Moonney	Mike	64587	IPRTF	IMG Midstream LLC	Alternate	06/08/2022	
104725	Acegan81	Amanda	70346	IPRTF	Lackavanna Energy Center LLC	Alternate	06/08/2022	
104726	AceTest	Amanda	51640	IPRTF	Lackavanna Energy Center LLC	Alternate	06/08/2022	
104727	ageantest	Amanda	70349	IPRTF	Lackavanna Energy Center LLC	Alternate	06/08/2022	
104735	Stupar	Rob	63607	IPRTF	Lackavanna Energy Center LLC	Primary	06/08/2022	
104728	Acegan81	Amanda	70346	IPRTF	Talen Energy Marketing, LLC	Primary	06/08/2022	
104729	AceTest	Amanda	51640	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
104730	ageantest	Amanda	70349	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
104731	dtmigrate	Debbie	70345	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	

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Please Note: If a roster is full, meaning one primary and three alternates already exist, one or all of those individual roster records must be terminated prior to using the Bulk Roster Update Feature. No roster terminations can be made using the Bulk Roster Update Wizard. See page nn for instructions on roster record termination.

The screenshot shows the 'Bulk Roster Update' wizard interface. At the top, there are tabs for 'Voting', 'Registration Details', and 'Roster Manager'. Below the tabs are navigation links: 'Contacts', 'Roster', 'Roster Requests', and 'Designates'. The main content area is titled 'Bulk Roster Update' and contains a progress indicator with four steps: 1. Committee, 2. Member, 3. Contact, and 4. Confirm. Step 1 is currently active. A note states: 'Note: If a roster is at full capacity (1 Primary and 3 Alternates), no additional roster representatives may be added. An existing roster representative will need to be removed prior to making the addition. To remove an individual from a roster, please navigate to the roster tab, then locate and terminate the individual's roster record.' Below the note are two columns. The left column, labeled 'Committee', contains a search bar and a list of committees: Audit Advisory Committee, Carbon Pricing Senior Task Force, Data Management Subcommittee - Joint, Demand Response Subcommittee, DER and Inverter-based Resources Subcommittee, Designated Entity Design Standards Subcommittee, Distributed Energy Resources Subcommittee, eDart User Group, eDART XML User Group, Electric Gas Coordination Senior Task Force, and Emerging Technologies Forum. The right column, labeled 'Member', contains a search bar and a list of members: ARR FTR Market Task Force, Capacity Capability Senior Task Force, and Dispatcher Training Subcommittee. Between the columns are navigation arrows: a right arrow, a double right arrow, a left arrow, and a double left arrow. At the bottom right of the wizard is a 'Next' button.

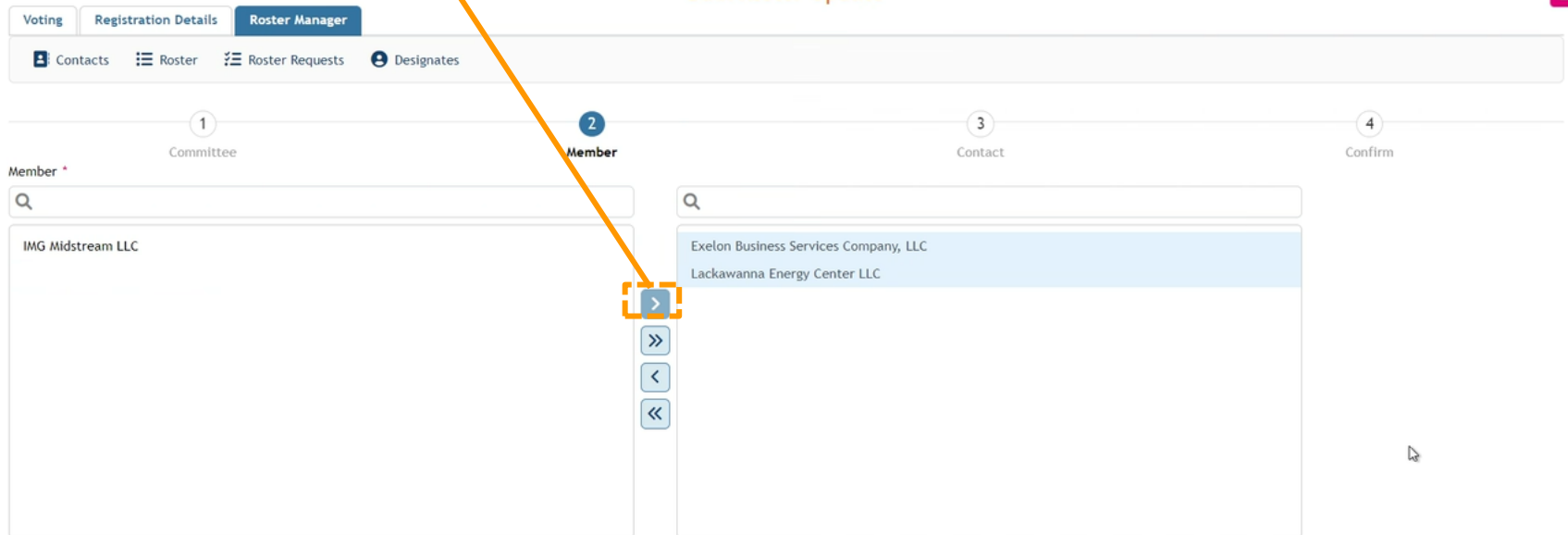
5. The Multiple Roster Wizard Screen will appear.

6. From the left column select one or more committee rosters to be updated. Use the selector arrow to move the committees to the right column.

7. Click Next.

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8. Select one or more Members from the left column. Use the selector arrow to move the Member(s) to the right column.



9. Click Next.

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Please Note: On the bottom of the Contact Screen, the existing roster representatives for the Committee(s) and Member(s) selected in the previous step will appear.

10. From the left column select one or more Contact(s) to be added. Use the selector arrow to move the Contact(s) to the right column.

Bulk Roster Update

Voting Registration Details Roster Manager

Contacts Roster Roster Requests Designates

1 Committee 2 Member 3 Contact 4 Confirm

Contact *

Note: A contact must exist before adding an individual to the roster. If the contact you are searching for below does not appear, please navigate to the Contacts tab, and add the new contact. From there, you will need to navigate back to the Roster tab, and begin the roster creation process again.

Q test

Acegan81, Amanda - acegan81@test.com
AceTest, Amanda - AceTest@pjm.com
dtmigrate, Debbie - dtmigrate@test.com
FebTivins, Amanda Roster - febtivins@test.com
mb_user1, moriam - mbuser1@test.com
mb_user10, moriam - mb_user10@test.com
mb_user7, Moriam - mb_user7@test.com
mbstg1, moriam - mbstg1@test.com
mbuser3, moriam - mbuser3@test.com
mclavm, Megan - megan@test.com
McTester, Megan - megantester@test.com

Q

Tester, Voting - amanda.egan@pjm.com
ageantest, Amanda - ageantest@test.com
FinolaShay, Megan - FinolaShay@test.com
JSmithTest, Megan - JSmithTest@test.com

Committee	Member	Roster Type	Last Name	First Name	Email Address
Capacity Capability Senior Task Force	Exelon Business Services Company, LLC	Alternate	Tester	Voting	amanda.egan@pjm.com
Capacity Capability Senior Task Force	Lackavanna Energy Center LLC	Alternate	Tester	Voting	amanda.egan@pjm.com
Dispatcher Training Subcommittee	Exelon Business Services Company, LLC	Alternate	Tester	Voting	amanda.egan@pjm.com
Dispatcher Training Subcommittee	Lackavanna Energy Center LLC	Alternate	Tester	Voting	amanda.egan@pjm.com

Back Next

11. Click Next.

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12. The Confirm Changes page will default to sort by Member Company and Committee to allow for Roster Type Updates. Also, the roster records that were selected as additions will have the trash icon if you would like to delete that selection before submitting the updates.

bulk roster update

Voting Registration Details **Roster Manager**

Contacts Roster Roster Requests Designates

Committee Member Contact Confirm

Confirm Changes

Additions

New	Last Name	First Name	Member Name	Committee	Roster Type	Actions
No	Tester	Voting	Exelon Business Services Company, LLC	Capacity Capability Senior Task Force	Alternate	
Yes	ageantest	Amanda	Exelon Business Services Company, LLC	Capacity Capability Senior Task Force	Alternate	
Yes	FinolaShay	Megan	Exelon Business Services Company, LLC	Capacity Capability Senior Task Force	Alternate	
Yes	JSmithTest	Megan	Exelon Business Services Company, LLC	Capacity Capability Senior Task Force	Alternate	
No	Tester	Voting	Lackawanna Energy Center LLC	Capacity Capability Senior Task Force	Alternate	
Yes	ageantest	Amanda	Lackawanna Energy Center LLC	Capacity Capability Senior Task Force	Alternate	
Yes	FinolaShay	Megan	Lackawanna Energy Center LLC	Capacity Capability Senior Task Force	Alternate	
Yes	JSmithTest	Megan	Lackawanna Energy Center LLC	Capacity Capability Senior Task Force	Alternate	
No	Tester	Voting	Exelon Business Services Company, LLC	Dispatcher Training Subcommittee	Alternate	
Yes	ageantest	Amanda	Exelon Business Services Company, LLC	Dispatcher Training Subcommittee	Alternate	
Yes	FinolaShay	Megan	Exelon Business Services Company, LLC	Dispatcher Training Subcommittee	Alternate	
Yes	JSmithTest	Megan	Exelon Business Services Company, LLC	Dispatcher Training Subcommittee	Alternate	
No	Tester	Voting	Lackawanna Energy Center LLC	Dispatcher Training Subcommittee	Alternate	
Yes	ageantest	Amanda	Lackawanna Energy Center LLC	Dispatcher Training Subcommittee	Alternate	
Yes	FinolaShay	Megan	Lackawanna Energy Center LLC	Dispatcher Training Subcommittee	Alternate	
Yes	JSmithTest	Megan	Lackawanna Energy Center LLC	Dispatcher Training Subcommittee	Alternate	

Back Submit

13. Click

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Please Note: After clicking Submit, if a roster is already at maximum capacity (one primary and three alternates) a message will appear detailing which updates failed.

Voting | Registration Details | **Roster Manager**

Failed: JSmithTest_Megan, Capacity Capability Senior Task Force, Exelon Business Services Company, LLC
Roster is full.
Failed: JSmithTest_Megan, Capacity Capability Senior Task Force, Lackawanna Energy Center LLC
Roster is full.
Failed: JSmithTest_Megan, Dispatcher Training Subcommittee, Exelon Business Services Company, LLC
Roster is full.
Failed: JSmithTest_Megan, Dispatcher Training Subcommittee, Lackawanna Energy Center LLC
Roster is full.

Success: Roster details have been saved successfully.

Contacts | **Roster** | Roster Requests | Designates

Active Rosters Only Refresh Reset Filters Create Advanced Reporting Bulk Terminate Rosters

Select	ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
<input type="checkbox"/>	104566	Acegan81	Amanda	70346	AAC	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104567	AceTest	Amanda	51640	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104568	ageantest	Amanda	70349	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104569	dtmigrate	Debbie	70345	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104582	Acegan81	Amanda	70346	CPSTF	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104583	AceTest	Amanda	51640	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104584	ageantest	Amanda	70349	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104585	dtmigrate	Debbie	70345	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104597	Acegan81	Amanda	70346	DRS	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104598	AceTest	Amanda	51640	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104599	ageantest	Amanda	70349	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104600	dtmigrate	Debbie	70345	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104621	Acegan81	Amanda	70346	MMUJAC	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104622	AceTest	Amanda	51640	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104623	ageantest	Amanda	70349	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	

Records Per Page: 15 (1 of 18) 261 records

Roster Manager User Guide

Duplicate Rosters- The functionality for this feature is to duplicate an existing roster when a brand new committee is established. **Rosters for all Member companies for which you are the roster representative will be added to the new roster committee when you duplicate an existing roster.**

1. Navigate to the Roster Manager tab.

3. Click on the Create button.

2. Click on the Roster subtab.

4. Select Duplicate Roster.

The screenshot displays the Roster Manager interface. At the top, there are tabs for 'Voting', 'Registration Details', and 'Roster Manager'. Below these are sub-tabs for 'Roster', 'Roster Requests', and 'Designates'. A 'Create' button is visible in the top right corner. The main area contains a table with columns for 'Select', 'ID', 'Last Name', 'First Name', 'Contact ID', 'Committee', 'Member Name', 'Roster Type', and 'Duplicate Roster'. The table lists 18 records for 'Exelon Business Services Company, LLC'. The 'Duplicate Roster' button is highlighted in the top right corner of the table.

Select	ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Duplicate Roster
<input type="checkbox"/>	104568	ageantest	Amanda	70349	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104569	dtmigrate	Debbie	70345	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104582	Acegan81	Amanda	70346	CPSTF	Exelon Business Services Company, LLC	Primary	06/07/2022
<input type="checkbox"/>	104583	AceTest	Amanda	51640	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104584	ageantest	Amanda	70349	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104585	dtmigrate	Debbie	70345	CPSTF	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104597	Acegan81	Amanda	70346	DRS	Exelon Business Services Company, LLC	Primary	06/07/2022
<input type="checkbox"/>	104598	AceTest	Amanda	51640	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104599	ageantest	Amanda	70349	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104600	dtmigrate	Debbie	70345	DRS	Exelon Business Services Company, LLC	Alternate	06/07/2022
<input type="checkbox"/>	104621	Acegan81	Amanda	70346	MMUJAC	Exelon Business Services Company, LLC	Primary	06/07/2022
<input type="checkbox"/>	104622	AceTest	Amanda	51640	MMUJAC	Exelon Business Services Company, LLC	Alternate	06/07/2022

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5. The Duplicate Roster dialog box will appear. Select the Duplicate Roster from and Duplicate Roster to values.

Duplicate Roster

Duplicate roster from *

Planning Committee

Duplicate roster to *

Test Committee 2

Save Cancel

6. Click Save

Please Note: If the roster you are duplicating to is already full (one primary and three alternates), you will receive a failure message. The existing roster representatives will need to be terminated prior to duplicating rosters. **When you duplicate a roster, it automatically updates the roster for all of the companies you are the roster manager.**

Private Lists will appear in the dropdown for Roster Managers but the Roster Manager will not be able to assign roster representatives to the Private Lists. These lists require Chair/Facilitator permission before being added. Roster requests can only be submitted for the following groups per the Roster Update Form [add link to public page here].

- Cost Development Subcommittee
- Data Management Subcommittee – Confidential
- Finance Committee
- Gas Electric Senior Task Force
- Liaison Committee
- Nominating Committee
- Nuclear Generator Owner/Operator Forum
- Public Interest and Environmental Organizations
- Relay Subcommittee
- Relay Testing Subcommittee
- Season Capacity Resources Sr. Task Force
- System Operations Subcommittee – Transmission
- Transmission Owners Agreement – Administrative Committee

Designates: Displays assigned designated voters for future meetings.

New Designate

1. Select New Designate button to assign a new designate to vote for a specific Member at a specific meeting.

The screenshot shows the 'Designates' section of the Roster Manager. At the top, there are navigation tabs: 'Voting', 'Registration Details', and 'Roster Manager'. Below these are sub-tabs: 'Contacts', 'Roster', 'Roster Requests', and 'Designates'. The 'Designates' sub-tab is active. Below the sub-tabs, there are buttons for 'Active Designates Only', 'Refresh', and 'Reset Filters'. The main area contains a table with columns: ID, Last Name, First Name, Contact ID, Committee, Member Name, Meeting Date, and Actions. The table is currently empty, displaying 'No Designate(s) found with given criteria.' and '0 records'. A 'New Designate' button is located in the top right corner of the table area, highlighted with a dashed orange box. An orange arrow points from the instruction box above to this button.

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2. The Create Designate dialog log box will appear.

3. Select Member Name, Contact, Committee and Meeting Date.

4. Click Save

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Edit/Duplicate Designate – will allow for Roster Manager to assign a Designated Voter (Proxy) for a single meeting. Meeting dates for specified committees will be prepopulated by PJM.

1. Roster Managers will have the ability to search existing designations for their companies by unchecking 'Active Designates Only' box to search for past designates.

The screenshot shows the Roster Manager interface with a table of designations. The table has columns for ID, Last Name, First Name, Contact ID, Committee, Member Name, Meeting Date, and Actions. The first three rows are visible, each with a pencil icon in the Actions column. The 'Active Designates Only' checkbox is checked, and the 'Refresh' button is highlighted. The 'New Designate' button is also visible in the top right corner.

ID	Last Name	First Name	Contact ID	Committee	Member Name	Meeting Date	Actions
97101	Scarboro	Dan	45284	MIC	Exelon Business Services Company, LLC	05/27/2022	[Pencil]
97080	Scarpignato	David	56660	MIC	Exelon Business Services Company, LLC	05/25/2022	[Pencil]
96520	testing221	Megan	54723	MRC	Exelon Business Services Company, LLC	12/14/2021	[Pencil]

2. To quickly re-add for further meetings on the same committee, click the pencil icon in the Actions column.

Roster Manager User Guide

3. The Edit Designate dialog box will appear.

Designate Info

Member Name * Exelon Business Services Company, LLC

Contact * testing321, Megan - testing321@test.com

Committee * Markets and Reliability Committee

Meeting Date * Select One

Select One

06/22/2022

Save Cancel

4. Select the Future Meeting from the drop down.

5. Click Save

Roster Manager User Guide

Bulk Terminate – This feature will allow roster managers to terminate more than one roster at a time.

1. Navigate to the Roster Manager.

The screenshot shows the top navigation bar with tabs for Voting, Registration Details, and Roster Manager. The Roster Manager tab is highlighted. Below the tabs are buttons for Contacts, Roster, Roster Requests, and Designates. The Roster button is highlighted with a dashed orange box. In the top right corner, there are buttons for Create, Advanced Reporting, and Bulk Terminate Rosters. The Bulk Terminate Rosters button is highlighted with a dashed orange box and an arrow pointing to it.

3. Click on the Roster subtab.

The screenshot shows a table of roster records. The table has columns for Last Name, First Name, Contact ID, Committee, and Member. The records are listed with checkboxes in the left margin. Several checkboxes are checked, indicating that those records are selected for termination. The Bulk Terminate Rosters button is visible in the top right corner.

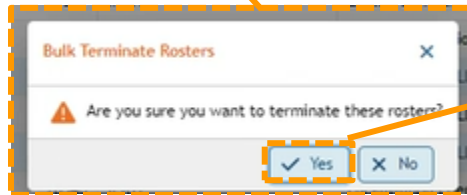
Last Name	First Name	Contact ID	Committee	Member
acegan81	Amanda	70346	IPRTF	Exelon Generation Company, LLC
104722 AceTest	Amanda	51640	IPRTF	Exelon Generation Company, LLC
104723 ageantest	Amanda	70349	IPRTF	Exelon Generation Company, LLC
104724 dtmigrate	Debbie	70345	IPRTF	Exelon Generation Company, LLC
104732 Seibel	August	62062	IPRTF	IMG Midstream LLC
104733 Bush	Doug	64586	IPRTF	IMG Midstream LLC
104734 Mooney	Hike	64587	IPRTF	IMG Midstream LLC
104725 Acegan81	Amanda	70346	IPRTF	Lackawanna Energy Center LLC
104726 AceTest	Amanda	51640	IPRTF	Lackawanna Energy Center LLC
104727 ageantest	Amanda	70349	IPRTF	Lackawanna Energy Center LLC
104735 Stupar	Rob	63607	IPRTF	Lackawanna Energy Center LLC
104728 Acegan81	Amanda	70346	IPRTF	Talen Energy Marketing, LLC
104729 AceTest	Amanda	51640	IPRTF	Talen Energy Marketing, LLC
104730 ageantest	Amanda	70349	IPRTF	Talen Energy Marketing, LLC
70345	IPRTF	70345	IPRTF	Talen Energy Marketing, LLC

2. Select the roster records to be terminated.

4. Click the Bulk Terminate Rosters

Roster Manager User Guide

5. A dialog box will appear.



6. Click Yes.

7. A success message will appear to show confirmation of terminated rosters. The terminated rosters will no longer appear on the Roster Manager Dashboard if the active roster only check box is selected on that screen.

Voting Registration Details **Roster Manager**

Success: Successfully Terminated Rosters

Contacts Roster Roster Requests Designates

Active Rosters Only Refresh Reset Filters

Create Advanced Reporting Bulk Terminate Rosters

Records Per Page: 15 (1 of 19)

Select	ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
<input type="checkbox"/>	104721	Acegan81	Amanda	70346	IPRTF	Exelon Generation Company, LLC	Primary	06/08/2022	
<input type="checkbox"/>	104723	ageantest	Amanda	70349	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104724	dtmigrate	Debbie	70345	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104733	Bush	Doug	64586	IPRTF	WIG Midstream LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104725	Acegan81	Amanda	70346	IPRTF	Lackawanna Energy Center LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104727	ageantest	Amanda	70349	IPRTF	Lackawanna Energy Center LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104735	Stupar	Rob	63607	IPRTF	Lackawanna Energy Center LLC	Primary	06/08/2022	
<input type="checkbox"/>	104728	Acegan81	Amanda	70346	IPRTF	Talen Energy Marketing, LLC	Primary	06/08/2022	
<input type="checkbox"/>	104729	AceTest	Amanda	51640	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104730	ageantest	Amanda	70349	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104731	dtmigrate	Debbie	70345	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104716	megan_ABC	Megan	69272	CCSTF	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104566	Acegan81	Amanda	70346	AAC	Exelon Business Services Company, LLC	Primary	06/07/2022	
<input type="checkbox"/>	104567	AceTest	Amanda	51640	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	
<input type="checkbox"/>	104568	ageantest	Amanda	70349	AAC	Exelon Business Services Company, LLC	Alternate	06/07/2022	

Records Per Page: 15 (1 of 19)

277 records

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8. If the Active Rosters Only checkbox is unchecked, you will see all previously terminated rosters.

Records Per Page: 15 (1 of 21)

Select	ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
<input type="checkbox"/>	104721	Acegan81	Amanda	70346	IPRTF	Exelon Generation Company, LLC	Primary	06/08/2022	
<input type="checkbox"/>	104723	ageantest	Amanda	70349	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104724	dtmigrate	Debbie	70345	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
<input checked="" type="checkbox"/>	104722	Ace Test	Amanda	51640	IPRTF	Exelon Generation Company, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104733	Bush	Doug	64586	IPRTF	IMG Midstream LLC	Alternate	06/08/2022	
<input checked="" type="checkbox"/>	104734	Mooney	Mike	64587	IPRTF	IMG Midstream LLC	Alternate	06/08/2022	
<input checked="" type="checkbox"/>	104732	Seibel	August	62062	IPRTF	IMG Midstream LLC	Primary	06/08/2022	
<input type="checkbox"/>	104725	Acegan81	Amanda	70346	IPRTF	Lackawanna Energy Center LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104727	ageantest	Amanda	70349	IPRTF	Lackawanna Energy Center LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104735	Stupar	Rob	63607	IPRTF	Lackawanna Energy Center LLC	Primary	06/08/2022	
<input checked="" type="checkbox"/>	104726	Ace Test	Amanda	51640	IPRTF	Lackawanna Energy Center LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104728	Acegan81	Amanda	70346	IPRTF	Talen Energy Marketing, LLC	Primary	06/08/2022	
<input type="checkbox"/>	104729	Ace Test	Amanda	51640	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104730	ageantest	Amanda	70349	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	
<input type="checkbox"/>	104731	dtmigrate	Debbie	70345	IPRTF	Talen Energy Marketing, LLC	Alternate	06/08/2022	

Records Per Page: 15 (1 of 21)

301 records