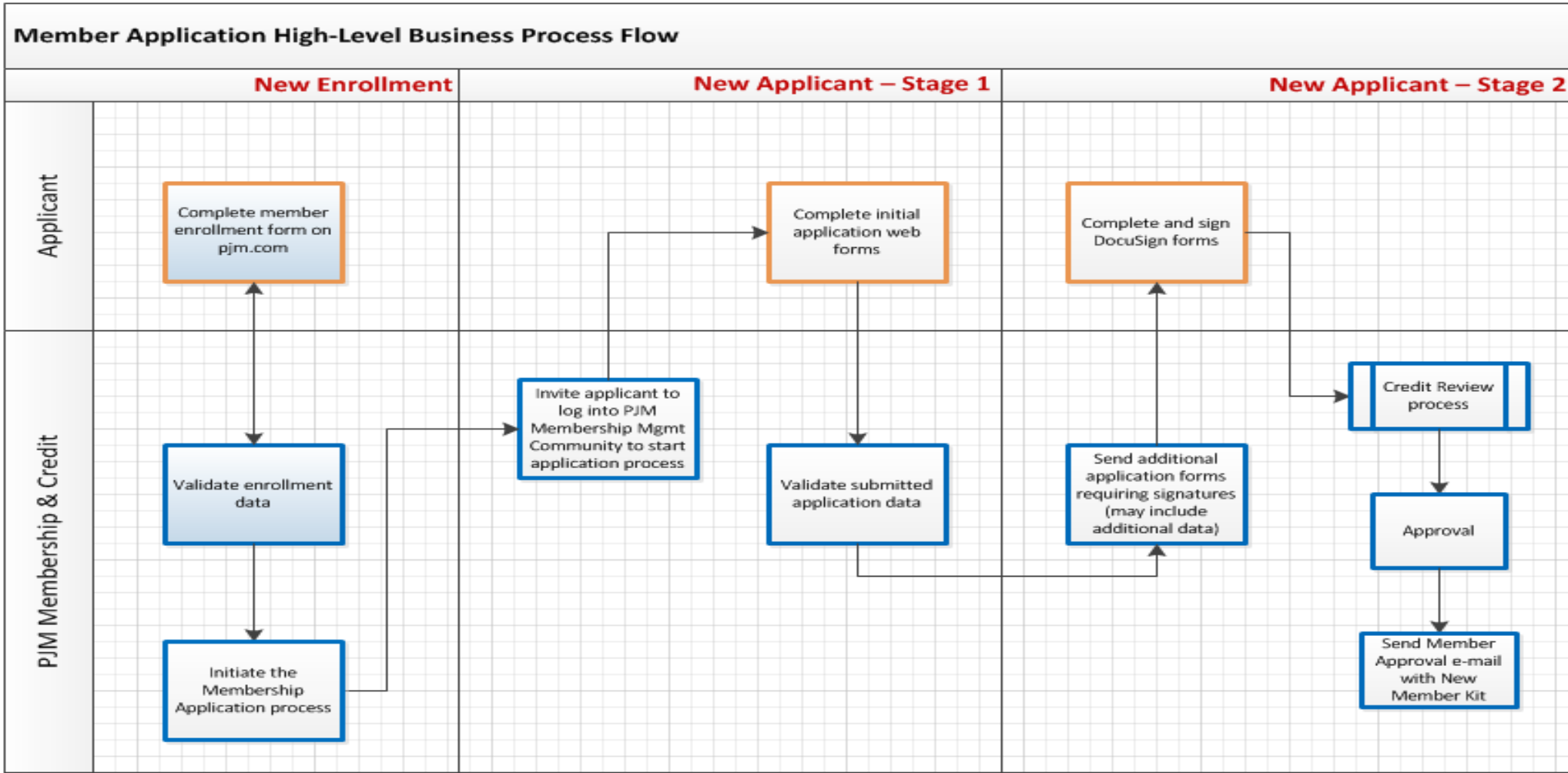


Membership Process Overview

Megan McLaverty
Member Liaison
Knowledge Management Center



Enrollment:

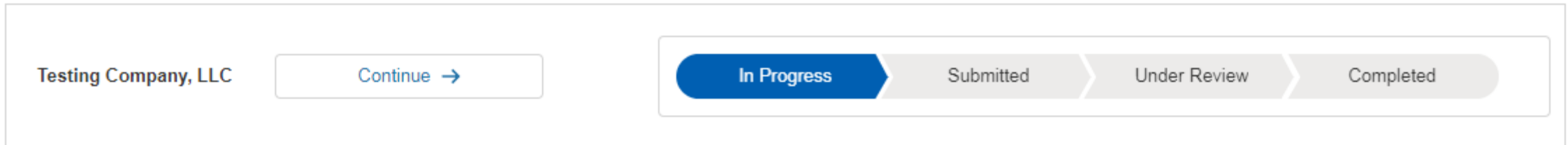
- New applicants begin the Membership process by filling out an enrollment form on pjm.com ([PJM Membership Enrollment](#))
- Basic company information is required on this form, along with the submission of state documentation in order to capture the legal name of the entity applying for membership
- An attestation form is then sent to the submitter which is required to be signed by an Officer of the company, allowing those listed on the form to fill out the required member information on the applicant's behalf in the Membership Management Community

Application Process:

- Those listed on the attestation form are provided access and instructions to our Membership Management Community to begin filling out the membership application (Stage 1)
- When the online portion of the application is submitted, additional documents are sent via DocuSign in order to complete the membership packet (Stage 2)
- Once the appropriate fees are collected and the complete membership application is submitted, the credit review begins and the applicant is now considered a ‘Pending Member’ (Stage 2)
 - This begins the 60 day window PJM has to approve a membership
 - Pending Member is added to [Pending Member](#) list on PJM.com

Member applicants are now able to track the status of their membership application(s) in the Membership Management Community

Membership Enrollment Process



Credit Review:

- Credit Application
 - Enhancement

Credit Application

Name of applicant company: [REDACTED] Membership Type: Voting Member

Employer Identification Number (EIN): [REDACTED]

* Required

* I certify that there does not exist any ongoing investigation by the Securities and Exchange Commission (SEC), the Federal Energy Regulatory Commission (FERC), the Commodity Futures Trading Commission (CFTC) or any other governing, regulatory, or standards body with respect to the Applicant or Applicant's guarantor (if any). I also certify that the Applicant has not been the subject of regulatory investigations in the past, has never had its market based rate authority suspended or terminated, and has never had its retail supplier license suspended or terminated. I further certify that to the best of my knowledge, none of the Applicant's officers, principals or employees involved in trading, and none of the organizations in which any of such individuals were formerly employed or had an association has ever, with respect to or resulting from any time in which such employment or association was in effect, been the subject of regulatory investigation, had its market based rate authority suspended or terminated, or had its retail supplier license suspended or terminated.

Agree
 Disagree

* Upload disclosures

Or drop files

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[Save And Complete](#)

- Membership Documentation Credit reviews:
 - Credit Application and associated documents
 - Affiliate Disclosure
 - W9
 - Officer Certification form
- When the credit review is complete and a pending member is considered approved from a credit perspective, an internal notification is sent out to multiple departments within PJM with the official notice of membership approval

- A 'Welcome to PJM' email is sent to the member on the date of approval
- A Client Manager is assigned to the new member and will contact the member within five business days to welcome member and speak about their participation in PJM
- Original countersigned documents are mailed to the identified Members Committee representative
 - Signed Schedule 4 (Standard Form of Agreement)
 - Signed Application for Membership
- Account/Tool access is granted within 24 hours of approval