



# Membership Management Community Contact Management

Knowledge Management Center  
Tech Change Forum  
August 21, 2018

PJM's new Contact Management feature in the Membership Management Community is scheduled to be released in late August.

- Access to the new feature will be 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 Management

Export: [CSV](#)  
 Role Definitions [PDF](#)  
 Contact Manager Attestation Form [PDF](#)  
[Create a Case](#)

Create contacts and/or assign contacts to roles.

Create & Assign

Select the **Member Roles** tab to view role assignments.

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

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Actions	Last name	First name	Member	Role	Type
	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="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

Search by last name or first name.

Edit or Delete role assignments.

## Contact Management

Export: [CSV](#)

Role Definitions [PDF](#)

Contact Manager Attestation Form [PDF](#)

[Create a Case](#)

[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.

## Contact Management

Export: [CSV](#)  
 Role Definitions [PDF](#)  
 Contact Manager Attestation Form [PDF](#)  
[Create a Case](#)

Select the **Contacts** tab to view all contacts.

Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES **CONTACTS**

Actions	Last name ▲	First name ◆	Member ◆	Employer ◆	Title ◆	Email ◆	Phone ◆
	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
	Contact	Joe	Voting Member 2		consultant	imagine3@fakeemail.com.sfstage	610-555-1212
	Contact	Marty	Voting Member 2	test	consultant	imagine5@fakeemail.com.sfstage	610-555-1212
	Contact	John	Voting Member 2		consultant	imagine5@fakeemail.com.sfstage	610-555-1212
	Duck	Donald	Voting Member 2		consultant	imagine7@fakeemail.com.sfstage	610-555-1212
	Mouse	Mickey	Voting Member 2	My Employer	Analyst	imagine2@fakeemail.com.sfstage	6105556666

Edit contact information

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

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

### Create & Assign Contact

Create a new contact or search for an existing 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 & Assign

* Last name <input type="text" value="Bugs"/>	* First name <input type="text" value="Bunny"/>
* Title <input type="text" value="Credit Manager"/>	Employer (if different than Member) <input type="text"/>
* Email <input type="text" value="bugsbunny@testemail.com"/>	Group email <input type="text" value="creditgroup@testemail.com"/>
* Preferred Email <input checked="" type="radio"/> Individual <input type="radio"/> Group	
* Phone <input type="text" value="666-555-1212"/>	* Phone type <input type="text" value="Office"/>
Alternate phone <input type="text"/>	Phone type <input type="text" value="Select one"/>
Comments <input type="text"/>	

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

### Create & Assign

\* Select Member  
Voting Member 2

\* Select Role(s)  
Select one or more

Select All | None

- Affiliate Disclosure Signer
- Audit
- Authorized Representative
- Billing
- Communications/Public Relations
- Compliance
- Credit
- Information Technology
- Legal
- Officer Certification Form

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

### Create & Assign

#### Voting Member 2

Audit	<input type="radio"/> Primary	<input checked="" type="radio"/> Alternate
Billing*	<input type="radio"/> Primary	<input checked="" type="radio"/> Alternate
Credit*	<input checked="" type="radio"/> Primary	<input type="radio"/> Alternate

Cancel Save



- [Membership Management Community Tools Page](#)
  - Contact Management User Guide
  - Contact Management Quick Guide
  - Contact Manager Attestation Form
- Questions?
  - Please contact [membershipforms@pjm.com](mailto:membershipforms@pjm.com)
  - PJM Customer Service: (610) 666-8980 / (866) 400-8980



# Appendix

## 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

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.