

Membership Management Community and Account Manager (CAM) Updates

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Membership Management



Community



Applications: An online membership enrollment tool.

Available now

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

Available now

Member Maintenance: An online feature for members to recertify member information and initiate member-level requests.

Available in 2020

- Member Maintenance features include:
 - Company name change requests
 - Membership withdrawal requests
 - Affiliate disclosure updates
 - Voting member changes
 - Member affiliate changes
 - Non-member affiliate changes
 - Related Party updates (applicable to voting members in the ED sector)
 - Company Account Manager (CAM) updates
 - Subaccount requests
 - Contact Manager updates

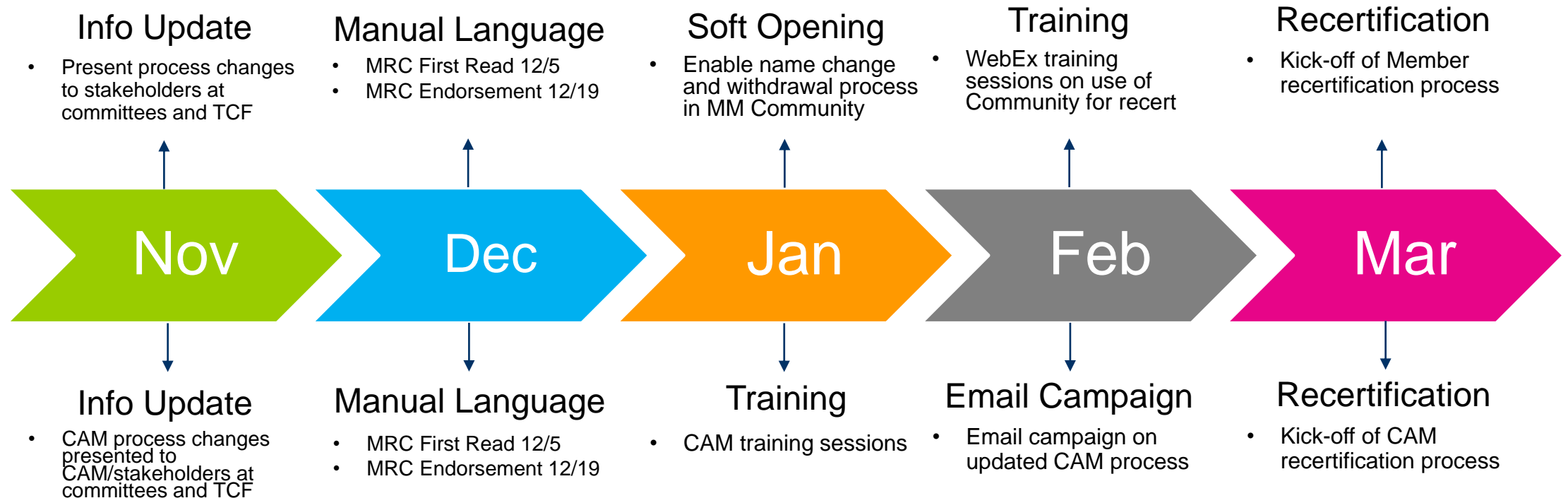
- Annual Member recertification process: members are required to validate the following information annually
 - Sector Selection
 - Affiliate Disclosure
 - Related Party
 - Contact Managers
 - Company Account Managers (CAMs)
- Recertification opens in mid-March and closes on April 30.

- Access to Member Maintenance feature will be available to an Officer of the Member or an Authorized Representative
 - New form to be sent to members in Mid-November for completion to set up access to Member Maintenance feature
- Contact Manager attestation form to retire in March 2020
 - Contact Manager changes must be initiated through Member Maintenance
 - Contact Managers will no longer be able to update the Officer or Authorized Rep role for the members they represent

- Company Account Managers (CAMs)
 - Manage users
 - Validate users
 - Reset passwords
 - Lock/unlock accounts
 - Provision tool access
 - Maintain whitelist
 - Request additional tool access at account level

- Manual 33: Administrative Services for the PJM Interconnection Operating Agreement
 - *New Process/Requirements*
 - Role of Officers/Authorized Rep (Sign-off, etc.)
 - Membership Maintenance items
 - Role of CAMs
 - Lead CAMs and Member CAMs
 - Same CAMs across accounts/subaccounts
 - New Recertification Requirements
 - CAM Recertification (Membership Management Community – Officer/Authorized Rep)
 - User Recertification (Account Manager - CAM)
 - Non-compliance with regard to recertification requests

Member Maintenance



CAM

Action Required	Deadline	Who May Be Affected
Share this information internally	Ongoing	All Members
Complete Secretary Certificate	Dec. 31, 2019	Officer of Member/Authorized Rep
Review details of this presentation	Ongoing	Contact Manager
Participate in upcoming training sessions	Jan. 2020	CAM, Authorized Rep, Officer

