# Annual User Certification Quick Guide

June 2021

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# Annual User Certification Quick Guide

## Overview

For security purposes, PJM now requires CAMs to perform an annual review of users and their authorized access to ensure that all user accounts in Account Manager have the appropriate access authorizations and to certify that the users who have access are authorized to do business on behalf of their listed organization. CAMs will have a 60-day window from start to close to certify their users and accesses.

### Certify All User Relationships to the Member/Main Account for Members

- Any users that only have Account Manager R/W access will not be part of user certification and do not need to be certified.
- Changes to user accounts and access after window open are not reflected on User Certification.
- Account Manager displays the users Employed As field which the CAM can opt to leave with the current value or update the value. The Employed As field must be populated or the record cannot be saved.
- If the profile is associated with a subaccount then pop up instructions that the Employed As applies to the person's relationship to the Member/Main Account.

### Certify System Account Accesses for All Members

- System Account only the accesses needs to be certified.
- User Relationship certification does not imply for system accounts.

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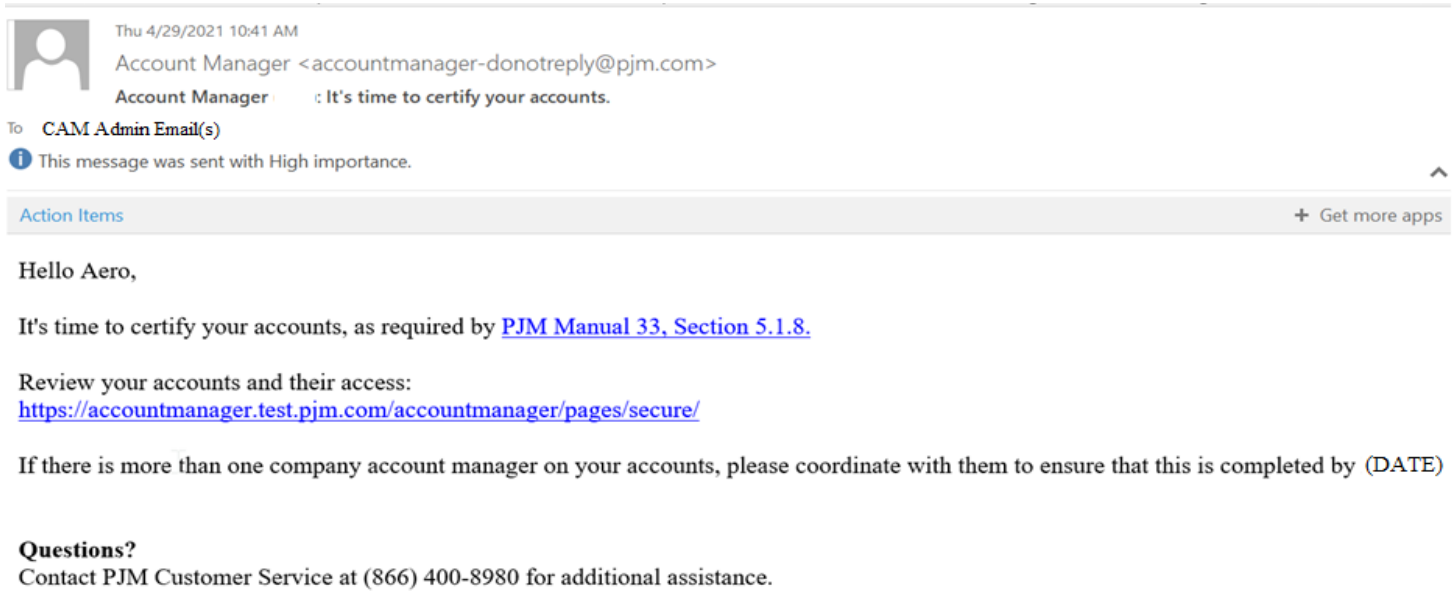
### Who Can Certify Users and their Accesses

- Single-account CAMs are able to certify users and their accesses for the company account that they manage.
- SUMA CAMs are able to certify users and their accesses for all company accounts that they manage. **Please note if you are not a CAM on the user's main account you will only be able to certify the access of the user on the company accounts for which you are the CAM.**

## Email Notifications for Certification Window Opening and Closing

All CAMs will receive email notifications when the annual user certification window opens and closes. CAMs will **ONLY** be able to certify their users and accesses during this 60 day window.

Email Notification to CAMs when window opens:



Thu 4/29/2021 10:41 AM

Account Manager <accountmanager-donotreply@pjm.com>

Account Manager : It's time to certify your accounts.

To CAM Admin Email(s)

This message was sent with High importance.

Action Items + Get more apps

Hello Aero,

It's time to certify your accounts, as required by PJM Manual 33, Section 5.1.8.

Review your accounts and their access:
https://accountmanager.test.pjm.com/accountmanager/pages/secure/

If there is more than one company account manager on your accounts, please coordinate with them to ensure that this is completed by (DATE)

**Questions?**
Contact PJM Customer Service at (866) 400-8980 for additional assistance.

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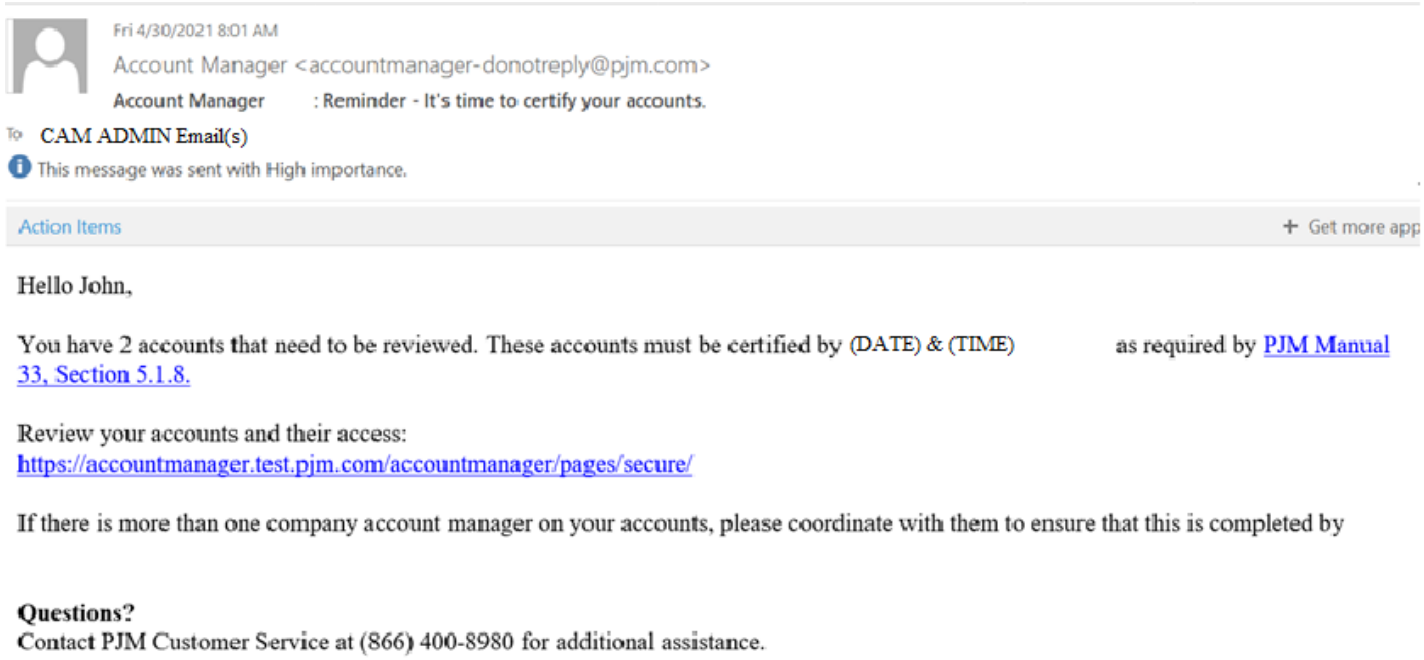
Email Notifications to CAMs when the will be window closes are sent at 15 days before, 7 days before, and 0 days of closing:



Fri 4/30/2021 8:01 AM

Account Manager <accountmanager-donotreply@pjm.com>

Account Manager : Reminder - It's time to certify your accounts.

To CAM ADMIN Email(s)

This message was sent with High importance.

Action Items + Get more app

Hello John,

You have 2 accounts that need to be reviewed. These accounts must be certified by (DATE) & (TIME) as required by PJM Manual 33, Section 5.1.8.

Review your accounts and their access:
https://accountmanager.test.pjm.com/accountmanager/pages/secure/

If there is more than one company account manager on your accounts, please coordinate with them to ensure that this is completed by

**Questions?**
Contact PJM Customer Service at (866) 400-8980 for additional assistance.

## Getting Started

For user certification actions, sign in to your CAM or SUMA CAM user account. Next click the “User Certification” tab, then either click the “Users” subtab or “System Accounts” subtab.

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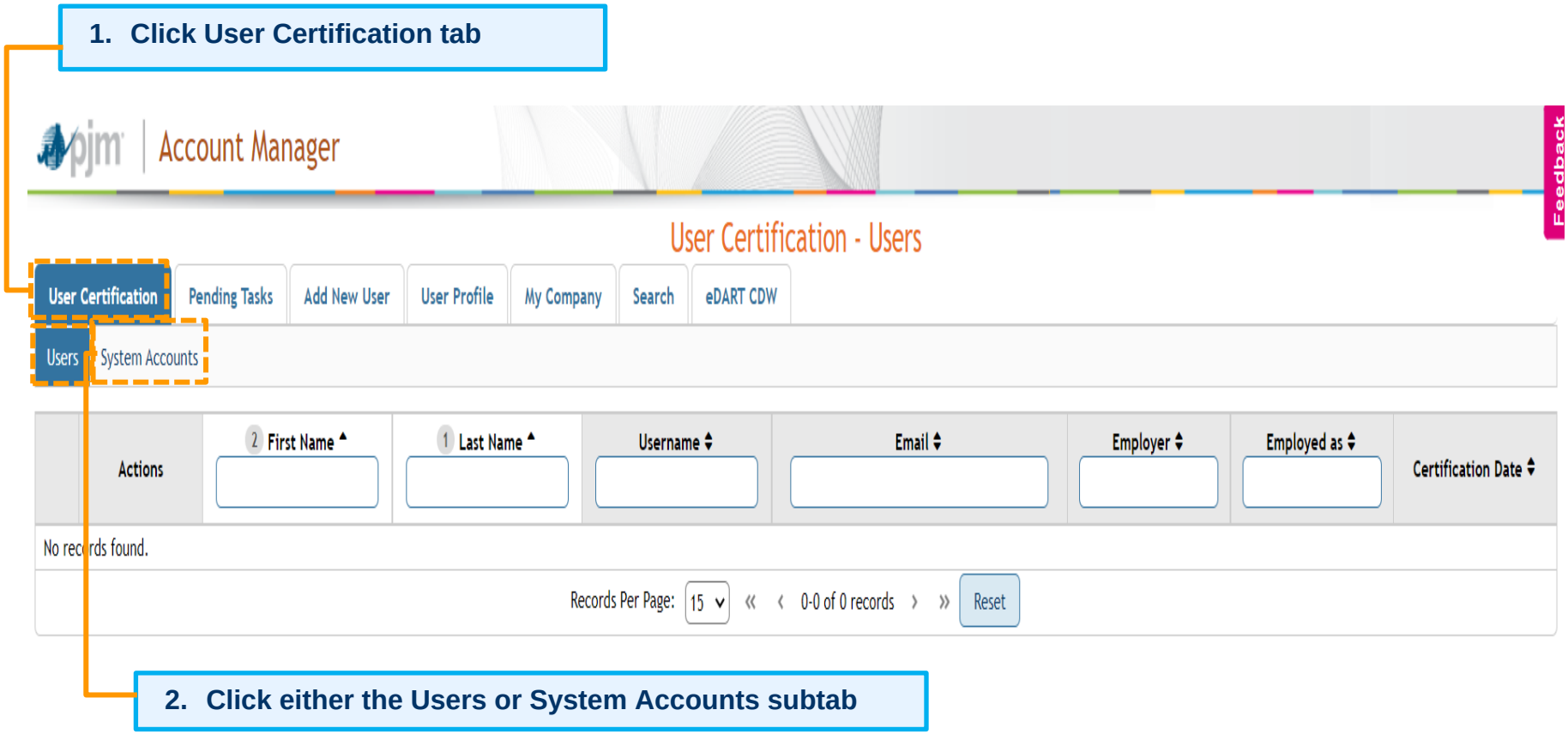


## How to Certify Users and Accesses for Users and System Accounts

### SEARCH AND FILTERING TIPS - USER CERTIFICATION SCREEN

- Cannot use Wildcards, i.e. if you are searching for all users with a first name that starts with the letter “J”, type J in First Name search box and hit Enter
- Can filter alphabetically or numerically by using the ascending or descending order arrows for first name, last name, username, email, employer, employed as, or certification date

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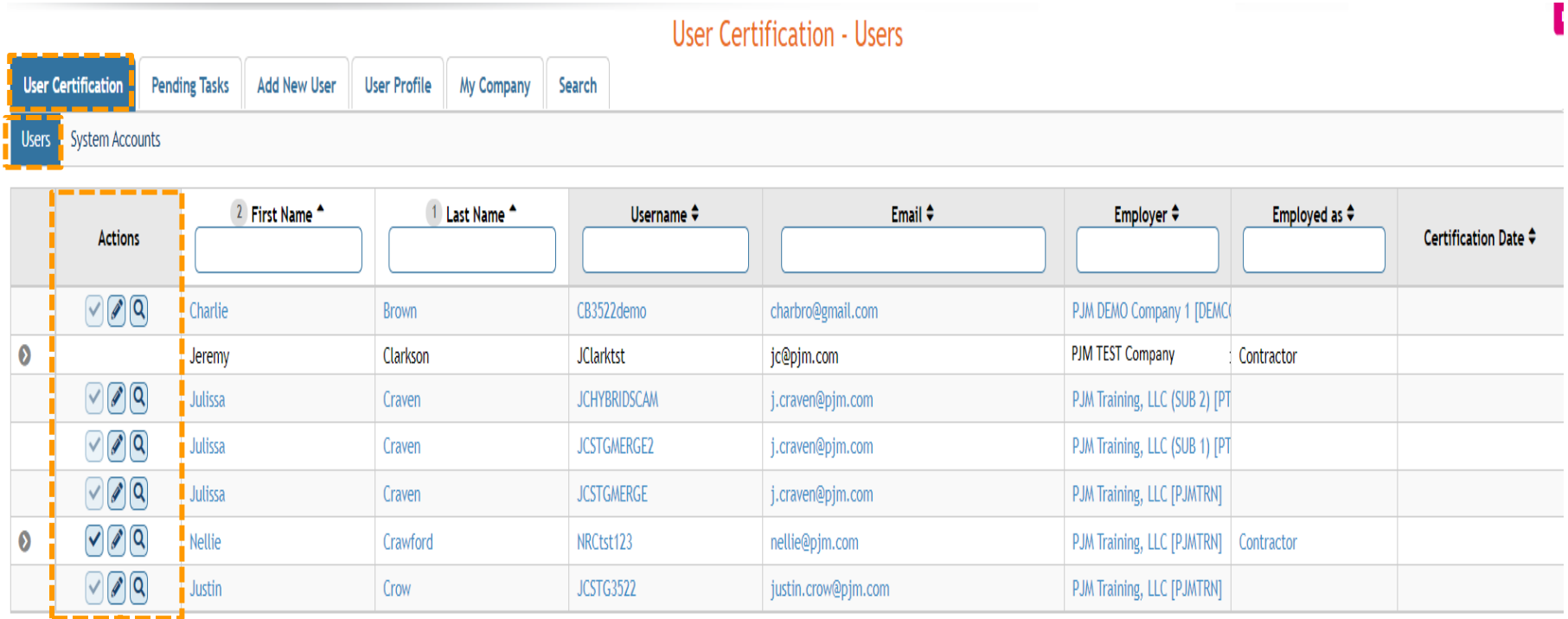
**Must have "Employed as" field completed before you can certify your users. Certify Checkmark box will remain inactive until selected. Except for SUMA CAMs if you are not a CAM on their main company account you will not be able to change the "Employed as" field.**

## User Accounts Certification




3. **In the Actions Column click the pencil icon to select the user's relationship to the main member company account (If it is not currently populated)**

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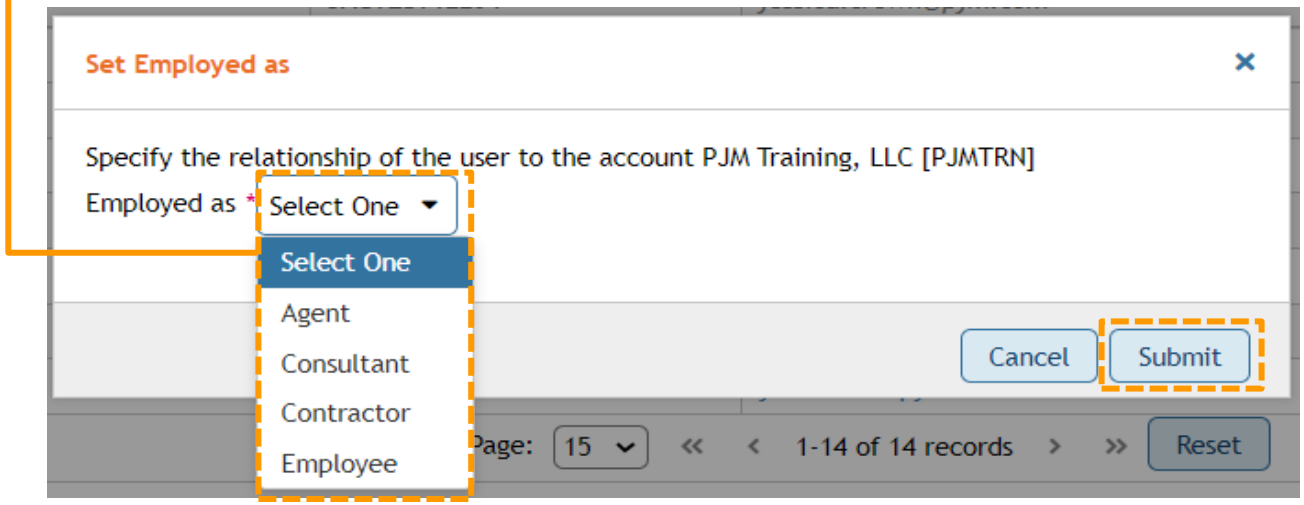
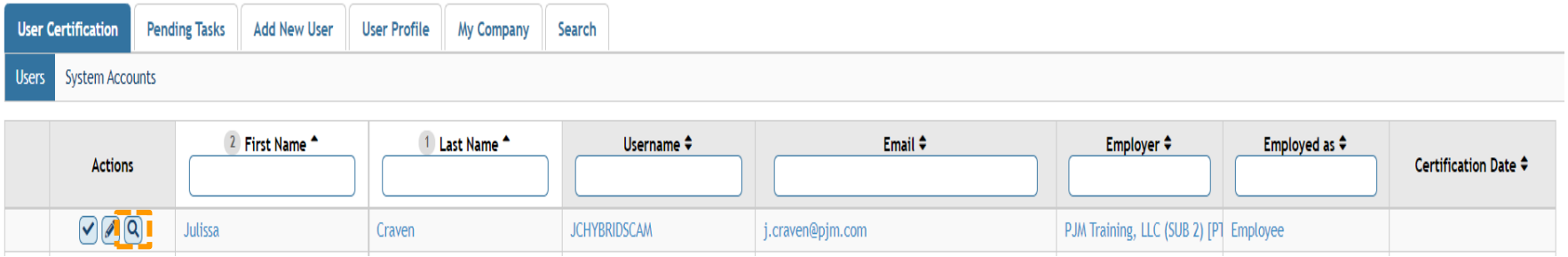
**4. In Set Employed as pop-up box, click the drop down arrow to select user's relationship to the member company account then click Submit**




Now you will be able to certify that user and their accesses. Next, click the spy glass to view the user's company account(s) and their access.



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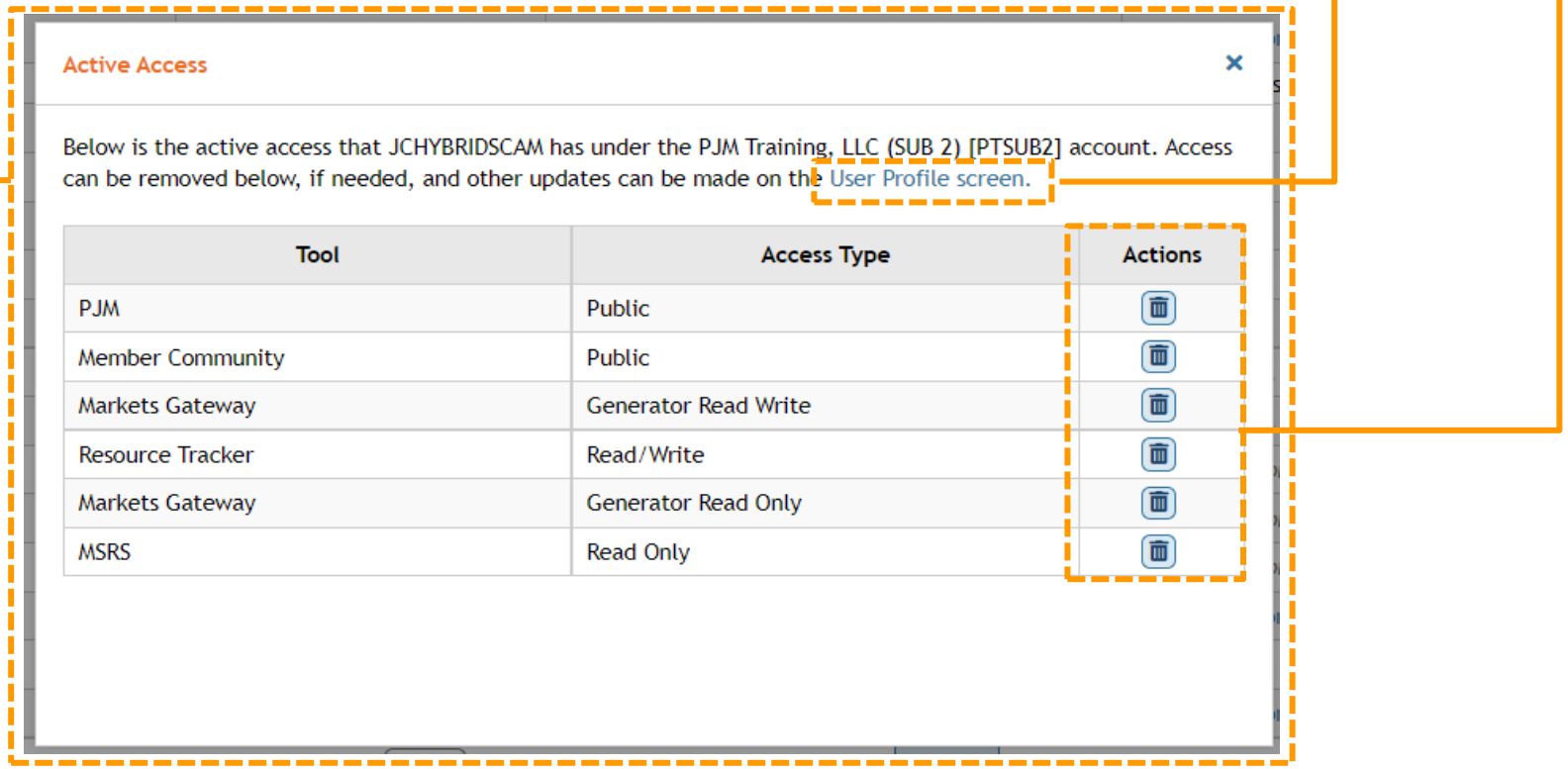
On the Active Access screen pop out screen you can:

**5.** View Active Access

**6.** Terminate access by clicking the trashcan icon in the Actions column, next to the access that needs to be removed

**7.** Click User Profile Screen link to make updates to their profile information



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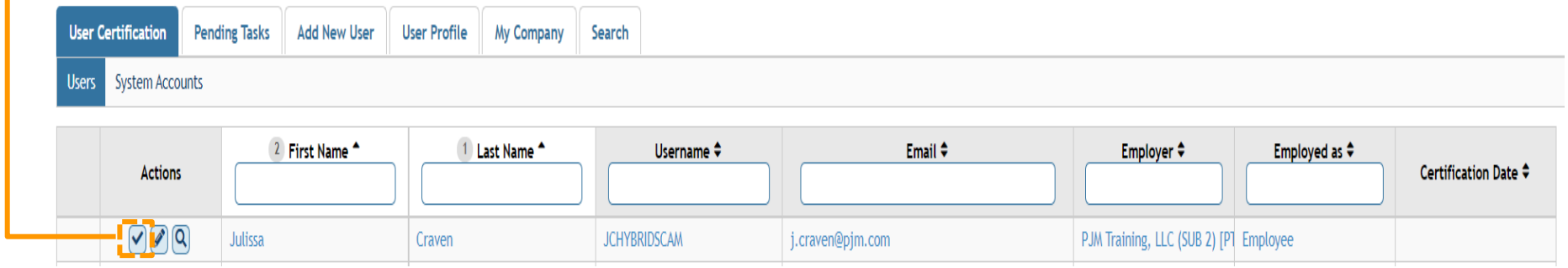
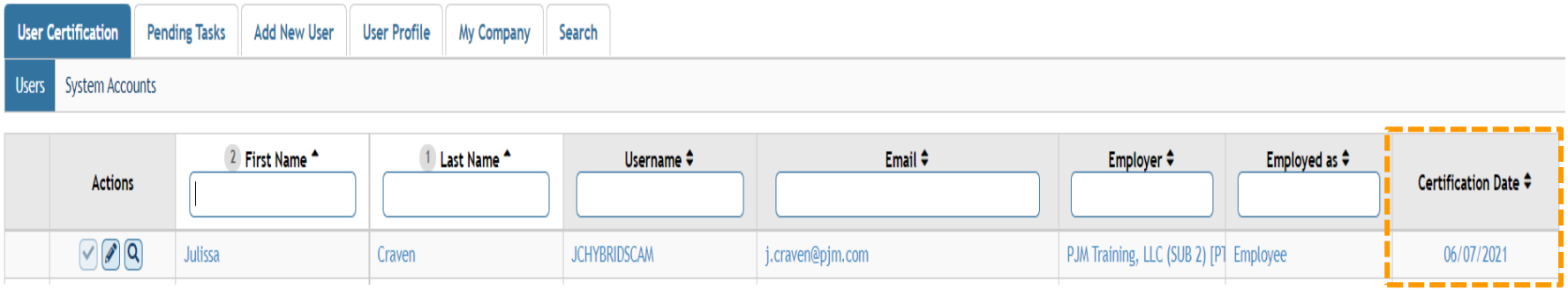
After reviewing the user and their accesses,

**8. Click the Checkmark box in the Actions Column to Certify the user**




You should now see the date populated in the Certification Date column for this user




**Repeat this workflow for each additional user on your certification list.**

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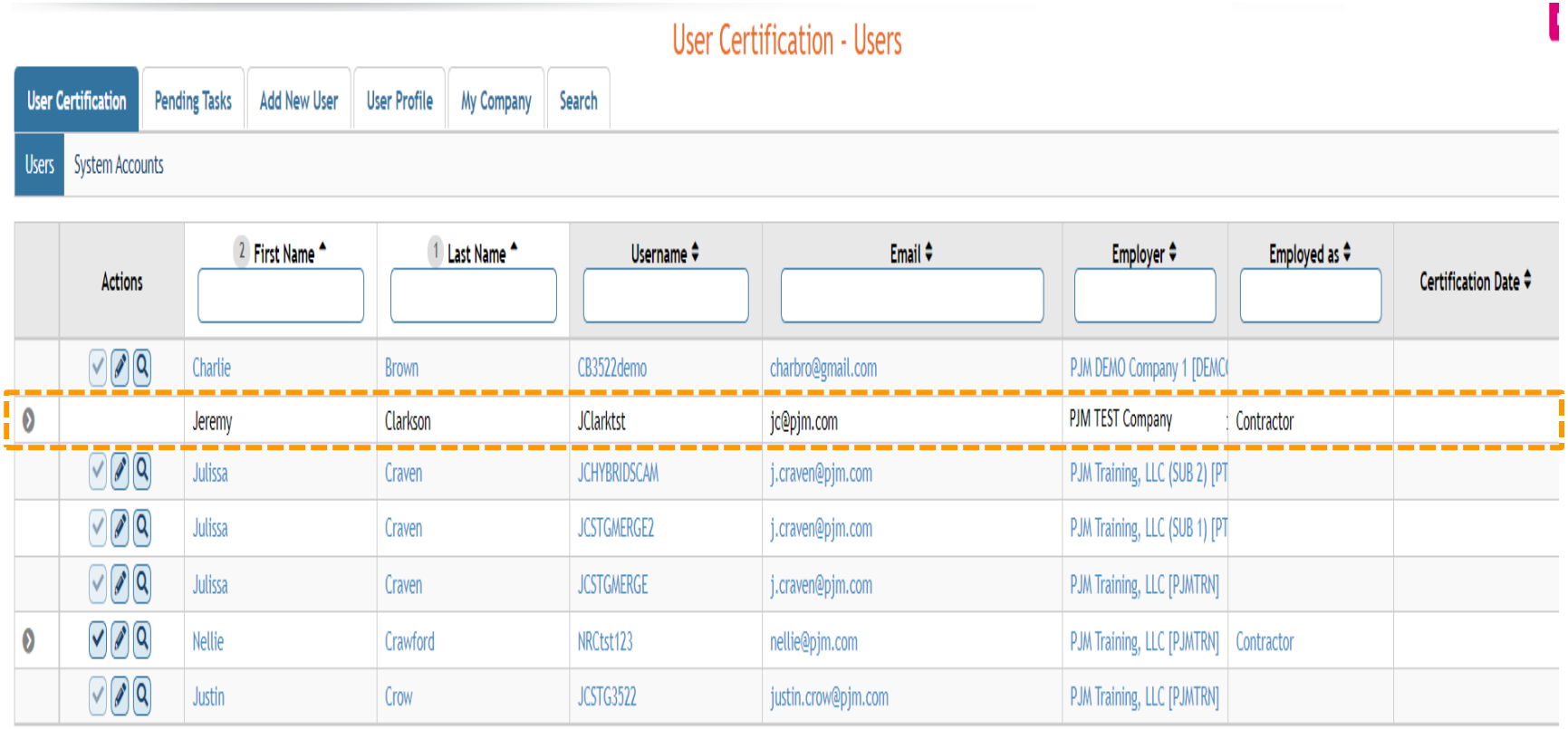
## SUMA CAMs

When you see a user in black rather than blue that means you are a CAM for that user just not for their main company account. You still need to certify the user's access that pertains to your company account. Please follow the process below for these users.



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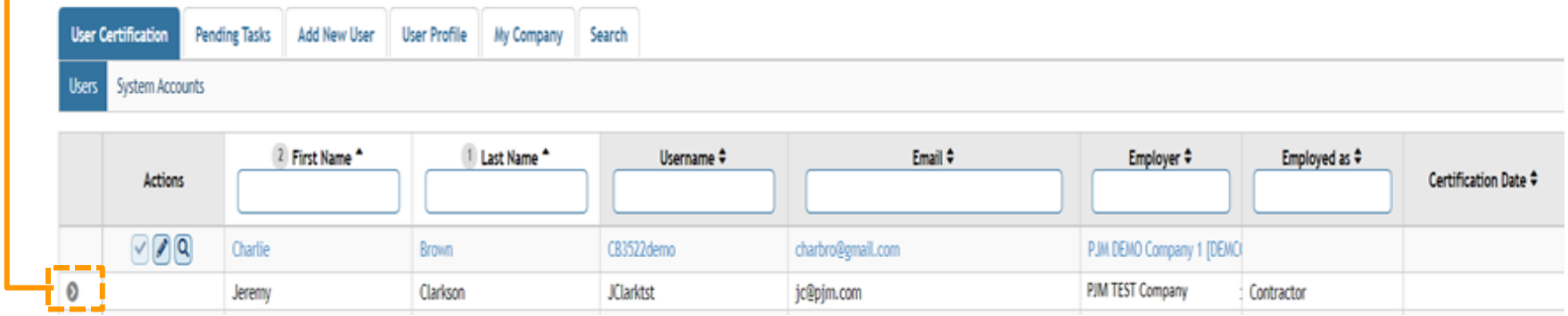
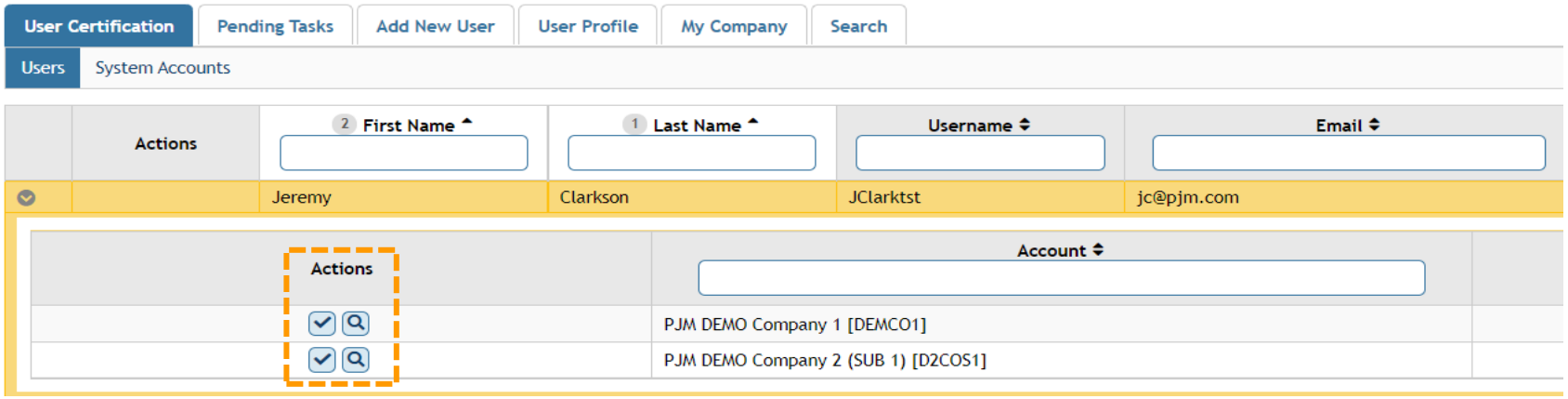
**1.** Click the drop down arrow in the first column




**2.** From the expanded rows view, you see the company accounts for which you are a CAM and the Actions column to either certify the user by clicking the checkmark icon or view accesses by clicking the spy glass icon.




**When you click the spy glass icon you will be able to view their active accesses, terminate accesses, or view their user profile page before you certify the user. Need to click the checkmark for each account.**

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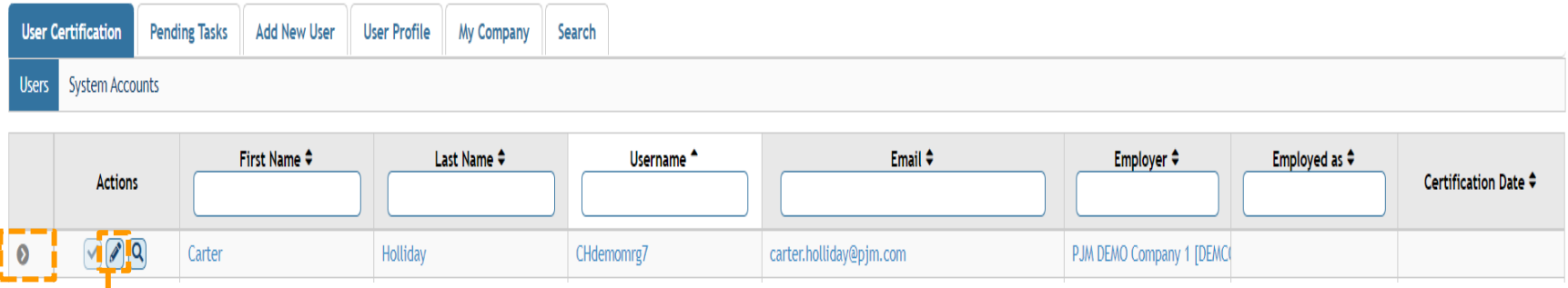
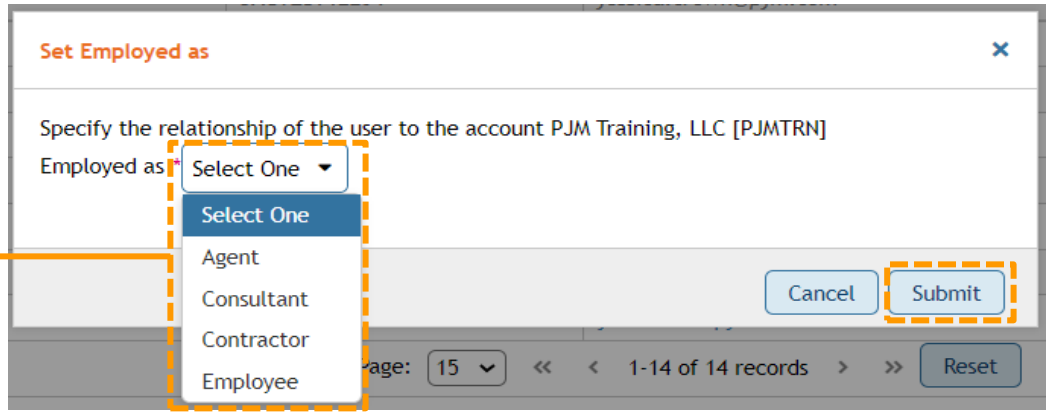
## SUMA User Accounts

For users that have more than one company account under their user account, you will also see the drop down arrow in the first column.




**1.** Click pencil icon to completed "Employed As" field, if not currently completed

**2.** In Set Employed as pop-up box, click the drop down arrow to select user's relationship to the member company account then click Submit



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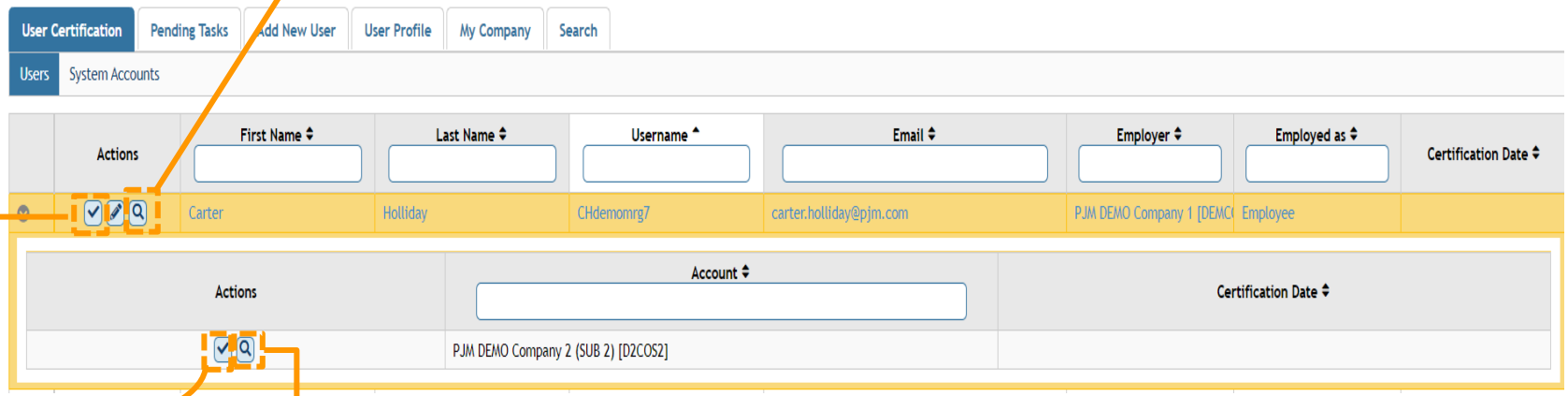
**3.** Select the spy glass in yellow banner to review access for the main company a new pop out box will list the access. From the pop out box you can review active access, terminate accesses, or click the link to the user profile to view their profile information.




**4.** Select the spy glass in Actions column to review secondary account(s) accesses. A pop out box will list the access for the secondary account. From the pop out box you can review active accesses, terminate accesses, or click the link to the user profile to view their profile.

After finalizing the accesses for the SUMA user account for the main account and secondary account(s):

**5.** Click the checkmark icon in the Actions column for each secondary account, and then click “Yes” in the pop out box to complete subaccount user certification.

**6.** Click the checkmark icon in the yellow banner, and then click “Yes” in the pop out box to complete main account user certification.

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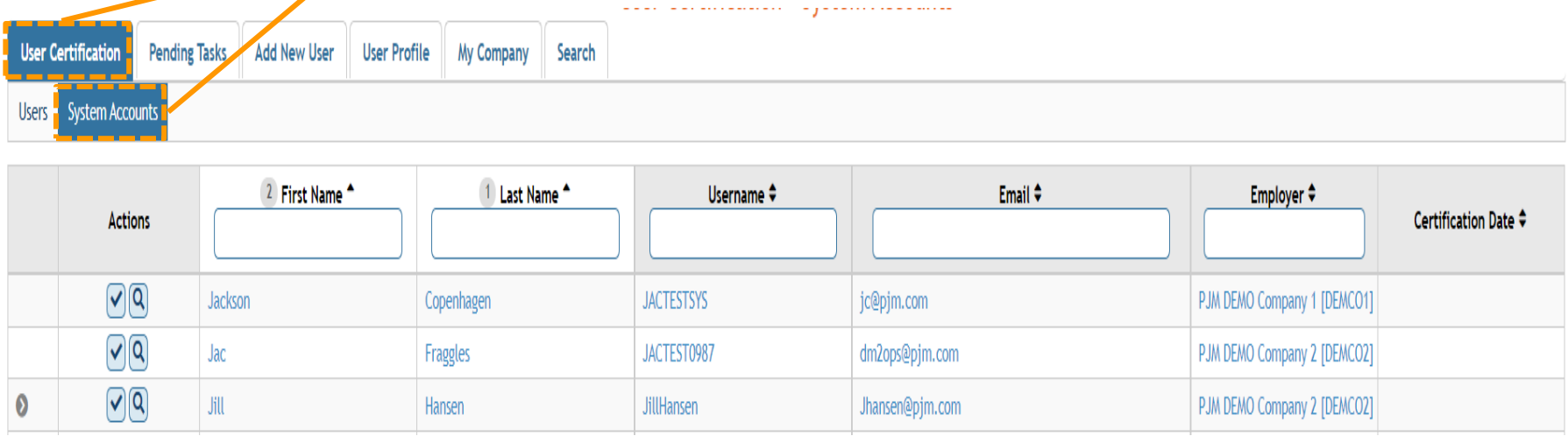
## System Accounts Certification

**Pleas follow User certification workflow whether it is a single System Account or SUMA System Account, except you will not have to set the "Employed As" field.**

**1.** Click User Certification tab then click System Accounts subtab.