



Account Manager User Certification

Amanda Egan

Membership Process and Services

As of June 2023

Action Required	Deadline	Who Is Affected
Validate users, user access, and user relationship to main (Member) account	August 31	Company Account Managers (CAMs) – Account Manager



- Account Manager User Certification
 - CAMs will be asked to validate all users, review user access, and establish a relationship (agent, vendor, employee) between users and the main (Member) account
 - 60 day window to complete: June 26 to August 31 in Production
 - Details available in [Manual 33](#), section 5.1.8
 - [User guide](#) available on Account Manager webpage of PJM.com

- Members that fail to complete the annual Member recertification requirements listed in section 3.1.11 of Manual 33 may be considered in non-monetary breach of The PJM Operating Agreement for failure to comply with Operating Agreement, section 11.3.1.
 - A defaulting Market Participant shall be precluded from buying or selling in the PJM Markets, FTR markets, or any other market operated by PJM until the default is remedied as set forth above;
 - A defaulting Member shall not be entitled to participate in the activities of any committee or other body established by the Members Committee PJM;
 - A defaulting Member shall not be entitled to vote on the Members Committee or any other committee or other body established pursuant to this Agreement.
 - PJM shall notify all other Members of the default.

Total Records

71,749

Total Certified

70,247

Users/System
Accounts Terminated

4,011

User/System Accounts
Access Terminations

3,291

- User Certification User Interface (UI) Enhancements: Easier usability and consolidated visualization of certification data
 - SUMA Enhancements: Enhancement with pop up window to ensure that CAMS see all user access in order to certify them in whole
 - Counter Display: Will show total number of completed certifications vs. the total number of certifications that a CAM is required to certify
 - Bulk Certify: Will allow CAMs to certify multiple users at a time
 - Bulk Terminate: Will allow CAMs to terminate multiple user at a time in the Certification User Interface
 - Recently added accesses will not be included in certification
 - Status Column: Updated to include Partially Completed certifications

Train Environment

- June 12 to June 23

Training/Demo for CAMs*

- June 15: 2 to 3 p.m.
- June 21: 10:00 to 11:00 a.m.
- July 10: 10:30 a.m. to 11:30 a.m.

* Sessions will be recorded and posted on PJM.com

Open House Sessions

- July 7: 1 p.m. to 3 p.m.
- July 20: 10 a.m. to 12 p.m.
- July 25: 1 p.m. to 3 p.m.
- August 3: 10 a.m. to 12 p.m.
- August 11: 1 p.m. to 3 p.m.
- August 16: 10 a.m. to 12 p.m.
- August 24: 1 p.m. to 3 p.m.
- August 30: 10 a.m. to 12 p.m.

Presenter:

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User Certification



Member Hotline

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