Membership Management Community
Contact Management

Suzanne Coyne
Knowledge Management Center
Credit Subcommittee
May 18, 2018

Membership Management Community

pjm®

My Membership: A new easy to use online membership enrollment process.

Available now

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

Roster Manager | Billing | Treasury | Credit | Legal | Authorized Representative | IT

Coming in Summer 2018

Before	After
Phone / PJM.com/ PJM Tools / E-Mail	Contact Managers Membership Management Community
↓	↓
Internal PJM Teams	Internal PJM Teams

Instituting a *member-managed* Contact Management tool provides the following:

- Enhanced security by establishing Contact Managers
- Transparent and centralized process
- Easy to maintain
- Managed by members who know their data best
- Improved data quality
- Flexible such that new roles can be identified and added in the future
- Not replacing Account Manager provisioning functionality

Contact Managers

- Contact Managers responsible for creating contacts and assigning roles
- Contact Attributes:
  - First and Last Name
  - Title
  - Employer, if different than Member
  - Phone Number & Alternate Phone Number
  - Phone Type (e.g., cell, office, other)
  - Individual Email
  - Group Email (optional)
  - Preferred Email Indicator (required only if both emails are provided)
- Required Roles: A primary contact and at least one alternate contact must be designated

Full Member Roles

Required Roles	Optional Roles
• Roster Manager (new) • Billing* • Credit* • Officer Certification Form • Legal (new) • Officer of the Company • Authorized Representative (new) • Information Technology (new)	• Treasury* • Communications/Public Relations* • Compliance* • Audit

* Prepopulated with existing contacts

- Roster Manager role will be identified in Contact Management.
- Roster Managers will then be set up by PJM in Voting application.
  - Authority to create and maintain rosters for all PJM stakeholder groups
  - Transparent and centralized process
  - Easy to maintain
  - Managed by members who know their data best
  - Improved data quality and validation
  - Easy and efficient process to add single meeting proxy voters

Next Steps

- Contact Managers have authority to maintain information in Membership Management Community
- Full Members need to designate Contact Managers
  - Form is available on Membership Management Community tools page
  - Form was included with email request for annual affiliate disclosures
- Membership Management Community updates will be provided at the Tech Change Forum

Appendix

Role Definitions

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 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 Definitions

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.