

Member Maintenance User Guide



June 2024

Contents

Overview	1
Logging In to the Membership Management Community.....	2
Member Maintenance Dashboard	3
Adding or Removing Contact Manager(s).....	4
Designating a Contact Manager	4
Removing a Contact Manager.....	6
Updating Your Affiliate Disclosure	8
Updating Your Voting Member.....	26
Requesting a Company Name Change.....	27
Managing Sub Accounts	29
Adding a Sub Account.....	29
Removing a Sub Account.....	31
Changing Related Parties for Your Company (Electric Distribution Sector Only)	32
Requesting To Update Market Participation Status in PJM Markets	34
Submitting a Market Participant Request	34
Adding, Editing or Removing Principals (MARKET PARTICIPANTS ONLY).....	36
Adding a Principal	36
Removing a Principal	39
Editing a Principal.....	41

- Requesting To Create a Principal Agent Declaration of Authority (DOA).....43***
- Requesting To Update Corporate Company Information44***
- Adding or Removing Company Account Managers (CAMs) for Your Company51***
 - Designating a Company Account Manager 51
 - Removing a Company Account Manager 54
- Withdrawal Request for Your Company.....57***

Overview

The Member Maintenance feature in the Membership Management Community was designed to make it easier for Members to manage requests to update the company information that is required by PJM. The features within the community allow for easy maintenance of:

- Company Name Change
- Affiliate Disclosure
- Company Account Managers (CAMs)
- Withdrawal requests
- Changes to voting
- Corporate Company Information
- Management of Sub Accounts
- Contact Managers
- Principals
- Requests to update market participation
- Request to create Principal Agent DOA
- Request to create Full Responsibility DOA

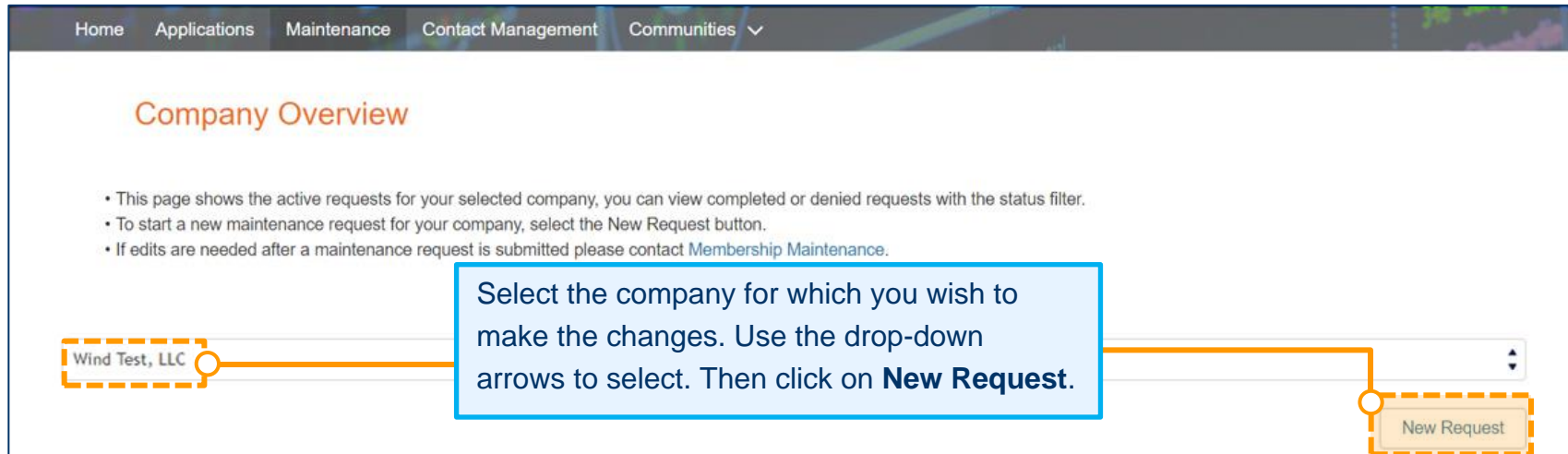
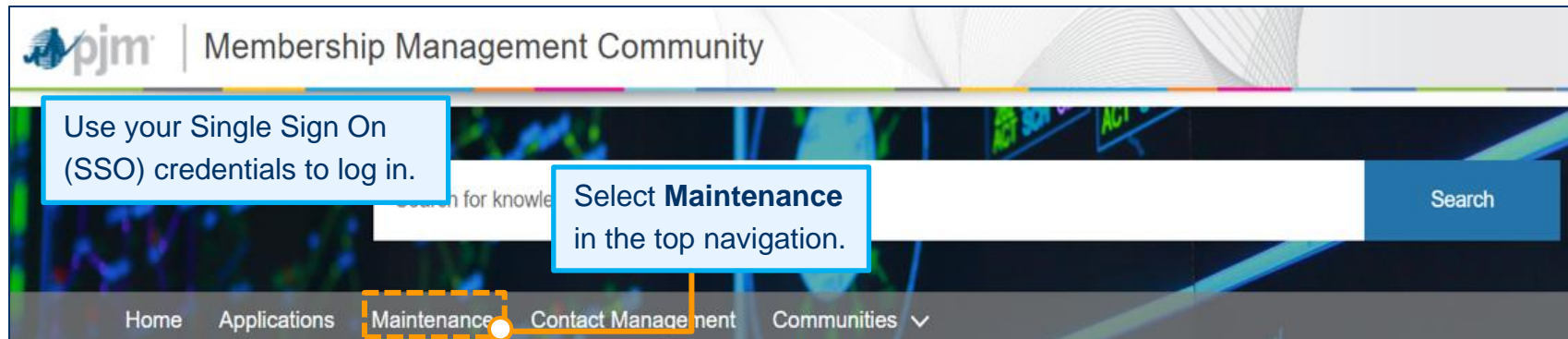
The Member Maintenance feature also provides transparent and centralized processes for improved data quality. It provides enhanced security by establishing officers, authorized representatives and maintenance managers who are responsible for maintaining the information required by PJM.

Please refer to [Manual 33: Administrative Services for the PJM Interconnection Operating Agreement](#) (PDF) for a complete description of all the processes contained in the Maintenance feature of the Membership Management Community.

Logging In to the Membership Management Community

Officers, authorized representatives and maintenance managers can sign in by navigating to the [Membership Management Community page](#) on PJM.com and clicking Sign In.

PJM.com homepage > Markets & Operations > PJM Tools > [Membership Management Community](#)



Member Maintenance Dashboard

The Member Maintenance dashboard allows officers, authorized representatives and maintenance managers to manage information for the companies they represent. This screen is the starting point for all change requests when you are logged in and have selected the company for which you would like to make changes.

The dashboard is a grid of 13 white rectangular cards, each with a title, a brief description, and a 'Get Started' button. The cards are arranged in four rows: the first three rows have three cards each, and the fourth row has one card on the left. A 'Back' button is located at the bottom right of the dashboard area.

Company Account Manager Designate or remove an individual from the role of CAM.	Affiliate Disclosure Request updates to Member and non-member affiliates.	Company Name Change Request a corporate name change.
Company Withdraw Initiate the request to withdraw from PJM membership.	Change Voting Member Request a change to your Voting Member.	Manage Sub Accounts Request to add or remove Sub Account.
Contact Management Request to add or remove a Contact Manager(s).	Market Participant Initiate a Market Participant Application if changing participation in the PJM Markets.	Principal Request to add or remove a Principal(s).
Principal Agent DOA Request to create Declaration of Authority.	Officer Certification Form Submit a new Officer Certification Form.	Full Responsibility DOA Request to create Full Responsibility Declaration of Authority.
Company Corporate Inform... Request to update company corporate information (address, stock information, etc.)		

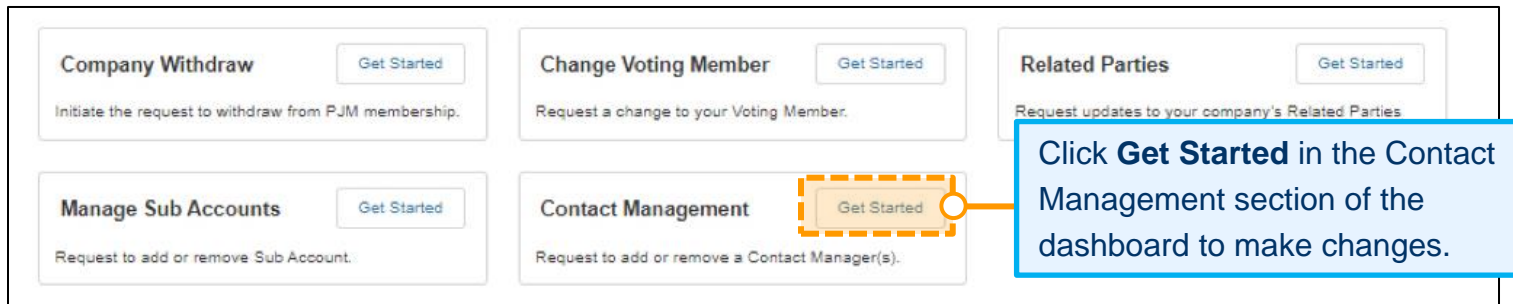
Back

Adding or Removing Contact Manager(s)

Members are required to designate a Contact Manager. The Contact Manager is an individual who is authorized to use the Contact Management feature of the Membership Management Community to provide PJM with the appropriate contact information for the roles PJM has identified as critical.

DESIGNATING A CONTACT MANAGER

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.



Company Withdraw [Get Started](#)
Initiate the request to withdraw from PJM membership.

Change Voting Member [Get Started](#)
Request a change to your Voting Member.

Related Parties [Get Started](#)
Request updates to your company's Related Parties

Manage Sub Accounts [Get Started](#)
Request to add or remove Sub Account.

Contact Management [Get Started](#)
Request to add or remove a Contact Manager(s).

Click **Get Started** in the Contact Management section of the dashboard to make changes.



Wind Test, LLC - Contact Management

Contact Managers ⓘ

Click on **Add New.**

First Name	Last Name	Email	Phone	Title	Employer	Actions
Test-ContMgr	User	monica.burkett@pjm.com				Revoke

Create New Contact Manager

* Required

* First name

* Last name

* Phone

* Title

* Email

* Employer

Complete the Create New Contact Manager form and click **Add** to submit your request.
(Note: PJM user name and group email are not required.)

Wind Test, LLC - Contact Management

Add New...

First Name	Last Name	Title	Employer	Actions
Test-Co				Revoke

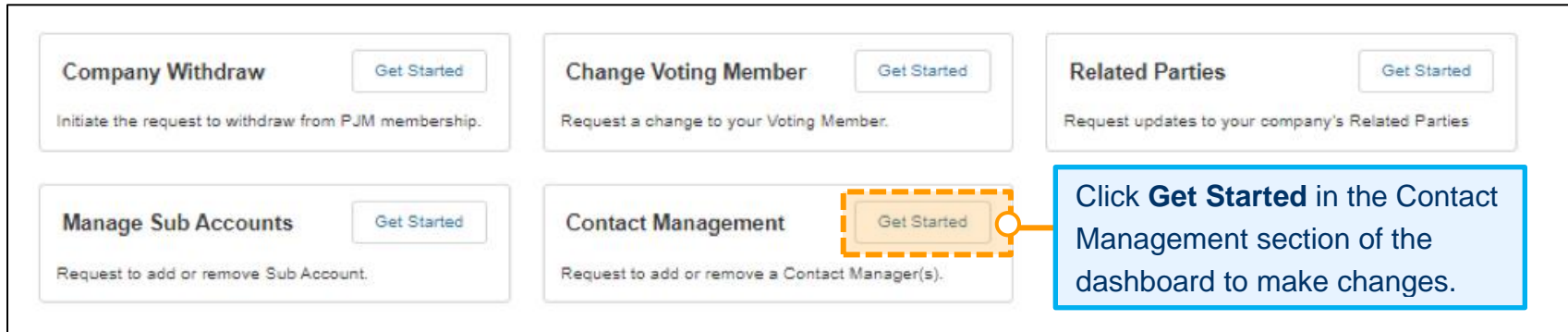
Pending Requests

Request	Submitted Date	Actions
Contact Management - Add New Contact Manager Test, User for Wind Test, LLC	02.28.2020	

Upon submitting your request to add a new Contact Manager, you will be directed to the page where you can view Pending Requests, which will include your request to add a new Contact Manager.

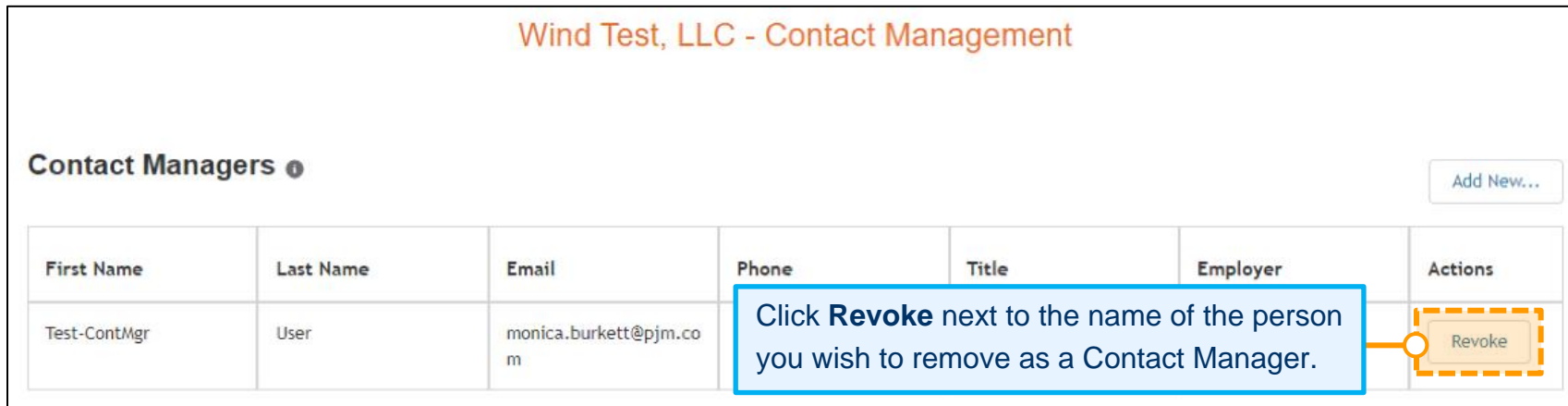
REMOVING A CONTACT MANAGER

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.



The screenshot shows a dashboard with five main sections, each with a 'Get Started' button. The 'Contact Management' section is highlighted with a dashed orange box, and a blue callout box points to it with the text: "Click **Get Started** in the Contact Management section of the dashboard to make changes."

Company Withdraw Initiate the request to withdraw from PJM membership.	Change Voting Member Request a change to your Voting Member.	Related Parties Request updates to your company's Related Parties
Manage Sub Accounts Request to add or remove Sub Account.	Contact Management Request to add or remove a Contact Manager(s).	



The screenshot shows the 'Wind Test, LLC - Contact Management' page. It features a table of contact managers and an 'Add New...' button. The 'Revoke' button in the 'Actions' column is highlighted with a dashed orange box, and a blue callout box points to it with the text: "Click **Revoke** next to the name of the person you wish to remove as a Contact Manager."

Contact Managers Add New...

First Name	Last Name	Email	Phone	Title	Employer	Actions
Test-ContMgr	User	monica.burkett@pjm.com				Revoke

Revoke Access

Are you sure you want to remove this Contact?

Click **Revoke** again to confirm that you want to remove the selected Contact Manager.

Contact Managers ?

First Name	Last Name	Email	Phone	Title	Employer	Actions
Test-ContMgr	User	monica.burkett@pjm.com				<input type="button" value="Revoke"/>

Pending Requests

Request	Submitted Date	Actions
Contact Management - Revoke Contact Manager Test-ContMgr, User for Wind Test, LLC	02.28.2020	<input type="button" value="Cancel"/>

Upon submitting the request to revoke a Contact Manager, you will be directed to the page below where you can view Pending Requests, which will include your request to revoke the Contact Manager.

Updating Your Affiliate Disclosure

Affiliate Disclosure information is required by PJM to properly administer the PJM Operating Agreement, including, but not limited to, the proper listing of Member status in the PJM Members Committee and the facilitation of PJM employee compliance with the securities divestiture requirements of the PJM Code of Conduct.

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.

Company Overview

- This page shows the active requests for your selected company, you can view completed or denied requests with the status filter.
- To start a new maintenance request for your company, select the New Request button.
- If edits are needed after a maintenance request is submitted please contact Membership Maintenance.

Wind Test, LLC

New Request

Company Account Manager Get Started
Designate or remove an individual from the role of CAM.

Affiliate Disclosure Get Started
Request updates to Member and non-member affiliates.

Request Updates Get Started
Request updates to Member and non-member affiliates.

Click **Get Started** in the Affiliate Disclosure section of the dashboard to make changes.

If changes are not needed, check the box next to the certification statement. Click **Submit**.

I certify the provided information is true, correct, and complete to the best of my knowledge, information, and belief.

Cancel Save and continue later Submit

Member Affiliations

No records to display.

[Edit](#)

Non-member Publicly Traded Affiliations

Company Name	Stock Information/Ticker symbol/CUSIP
Testing Dups, LLC	<input checked="" type="checkbox"/>
Testing Dups, LLC	<input checked="" type="checkbox"/>
Megan Company LLC	<input checked="" type="checkbox"/>
Testing Dups, LLC	<input checked="" type="checkbox"/>

[Edit](#)

I certify the provided information is true, correct, and complete to the best of my knowledge, information, and belief.

[Cancel](#) [Save and continue later](#) [Submit](#)

*Note: A blue callout box points to the 'Submit' button with the text: "If changes are not needed, check the box next to the certification statement. Click **Submit**."*

Affiliate Disclosure ⓘ

- If changes are not needed, please select the certification check box at the bottom of the screen and click 'Submit'.
- Click on [Print View](#) to open the printable view in next window.

[Affiliate Definition per the Operating Agreement](#)

Voting Member:

If a change is needed to your Voting Member, navigate to the Change Voting Member Request after all Affiliate Disclosure updates are submitted. Please note all Member Affiliate updates need to be approved by PJM before a new Voting Member can be selected.





Member Affiliations

No records to display.

Edit

To add/remove/update Affiliate information, select the **Edit** button for the section(s) that needs to be updated.

Non-member Publicly Traded Affiliations

Company Name	Stock Information/Ticker symbol/CUSIP
Testing Dups, LLC	
Testing Dups, LLC	
Megan Company LLC	
Testing Dups, LLC	

Edit

To add/remove/update Affiliate information, select the **Edit** button for the section(s) that needs to be updated.

Non-member Non-publicly Traded Affiliations

No Files to display.

Edit

Note: The following pages will have instructions for each section.

Corporate Parents

Company Name	Stock symbol/Ticker symbol/CUSIP number	Immediate Corporate	Ultimate Corporate
Megan Company LLC		✓	
Testing Again, LLC			✓
Testing Dups, LLC			✓
Testing Dups, LLC			✓
Testing Dups, LLC			✓
Wind Test, LLC		✓	✓

Edit

Corporate Structure Organizational Chart

No Files to display.

Edit

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure

- If changes are not needed, please select the certification check box at the bottom of the screen and click 'Submit'.
- Click on [Print View](#) to open the printable view in next window.

Affiliate Definition per the Operating Agreement

Voting Member:

If a change is needed to your Voting Member, navigate to the Change Voting Member Request after all Affiliate Disclosure updates are submitted. Please note all Member Affiliate updates need to be approved by PJM before a new Voting Member can be selected.





Member Affiliations

No records to display.

Edit

To add/remove/update Affiliate information, select the **Edit** button for the section(s) that needs to be updated.

Non-member Publicly Traded Affiliations

Company Name	Stock Information/Ticker symbol/CUSIP
Testing Dups, LLC	
Testing Dups, LLC	
Megan Company LLC	
Testing Dups, LLC	

Edit

Non-member Non-publicly Traded Affiliations







No Files to display.

To add/remove/update Affiliate information, select the **Edit** button for the section(s) that needs to be updated.

Edit

Note: The following pages will have instructions for each section.

Corporate Parents

Company Name	Stock symbol/Ticker symbol/CUSIP number	Immediate Corporate	Ultimate Corporate
Megan Company LLC		✓	
Testing Again, LLC			✓
Testing Dups, LLC			✓
Testing Dups, LLC			✓
Testing Dups, LLC			✓
Wind Test, LLC		✓	✓

Edit

Corporate Structure Organizational Chart

No Files to display.

Edit

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

Add or remove current Member Affiliations by using the arrows. Click **Save** when finished.

Member Affiliations

If applicable, add or remove current member affiliations by using 'arrows'.

Current PJM Members

- 527 Energy Inc.
- 7 Bridges Solar, LLC
- AC Energy, LLC
- Acciona Energy North America Corporation
- ACT Commodities Inc.

Currently Affiliated Members

Cancel

Save

If applicable, add or remove any Non-member Publicly Traded Affiliations per the PJM Operating Agreement definition of Affiliate. Click **Save and close** when finished.



- Click **Add** to enter the information of the Non-member Publicly Traded Affiliation.
- Select the **trash can** icon to delete existing Non-member Publicly Traded Affiliation.

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

Non-member Publicly Traded Affiliations

- If applicable, please add or remove any non-member publicly traded Affiliates per the PJM Operating Agreement definition of Affiliate.
- Select the 'Add' button to enter the information of the non-member publicly traded Affiliates.
- Select the trash can icon to delete existing non-member publicly traded Affiliates.
- If you need to update the company name, please contact Membershipforms@pjm.com.

Company Name	Stock Information/Ticker symbol/CUSIP	Remove
Test Company		

+ Add

Save and close

If applicable, click the **pencil** icon to edit Stock Information/Ticker symbol/CUSIP. Select **Save and close** upon completion.

Enter the Company Name. Enter the Employee Identification Number (EIN) and website if available. Check the applicable corporate relationship type. Click **Next**.

New Affiliation: Non-member Affiliation

* Company Name

Employee Identification Number (EIN)

CUSIP

Type

Immediate Parent

Ultimate Parent

Website

New Affiliation: Non-member Affiliation

Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
No records to display.		

Click **Add New** to add Stock Symbol/Ticker Symbol and Stock Exchange. These fields are required.

Create New Stock Symbol

Add Stock Symbol/Ticker Symbol and Stock Exchange. These fields are required. Click **Add**.

* Required

* Stock Symbol/Ticket symbol

* Stock Exchange

New Affiliation: Non-member Affiliation

Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
TE	New York Stock Exchange (NYSE)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>











Home Applications Maintenance Contact Management Communities

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

Non-member Publicly Traded Affiliations

- If applicable, please add or remove any non-member publicly traded Affiliates per the PJM Operating Agreement definition of Affiliate.
- Select the 'Add' button to enter the information of the non-member publicly traded Affiliates.
- Select the trash can icon to delete existing non-member publicly traded Affiliates.
- If you need to update the company name, please contact Membershipforms@pjm.com.

Company Name	Stock Information/Ticker symbol/CUSIP	Remove
Test Company		
Wind Test 2 LLC		
Wind Test Three		
Wind Test 4		
Test Four		

[+ Add](#)

[Save and close](#)

Click **Save and close.**

To update Non-member Non-publicly Traded Affiliations, click **Edit**.

Non-member Non-publicly Traded Affiliations

No Files to display.

Edit

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

If applicable, upload an Excel or PDF document containing all Non-member Non-publicly Traded Affiliations. Documents such as company annual reports are acceptable. Click **Save**.

Non-member Non-publicly Traded Affiliations

Uploaded files such as company annual reports are acceptable for this section.

If applicable, review previously uploaded files. Select the trash can icon to delete files that are no longer applicable.

No Files are linked please upload file(s).

Edit Non-member Non-publicly Traded Affiliations

If applicable, upload new files containing all non-member non-publicly traded Affiliations.

[Upload Files](#) Or drop files

Accepted file types: .XLS, .DOC, .DOCX, .PDF

Cancel

Save

Home Applications Maintenance Contact Management Communities

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure

Corporate Parents

- Please identify if any affiliates of the applicant are Immediate Corporate Parents.
- Select the 'Add' button to enter the information of the applicant's Corporate Parents.
- Select the pencil icon to edit any details for newly added Corporate Parents.
- Select the trash can icon to delete any newly added Corporate Parents.
- Select the 'Preview and Submit' button to proceed to the preview screen.

Corporate Parents

- Identify if any Affiliates of the Member are Immediate Corporate and/or Ultimate Corporate Parents. Select **Not Applicable** if this does not apply.
- Click **Add** to enter the information of the Member's Corporate Parent.

Company Name	Stock symbol/Ticker symbol/CUSIP number	Immediate Corporate	Ultimate Corporate	Not Applicable
Test Company		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Four		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test 2 LLC		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test 4		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test Three		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

+ Add

Cancel Save

New Corporate Parent

Enter the New Corporate Parent information, then click **Next**.

* Select Member Company
-- Select a Company --

Employer Identification Number (EIN)

CUSIP

* Type
 Immediate Parent Ultimate Parent

Website

New Corporate Parent

Note: If the company is not publicly traded, click **Save**. If the company is publicly traded, click **Add New** to add the company stock information.

Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
No records to display.		

Create New Stock Symbol

Click **Add** to add Stock Symbol/Ticker symbol and Stock Exchange. These fields are required. Upon completion, click **Save**.

* Required

* Stock Symbol/Ticket symbol

* Stock Exchange

-- Select a Stock Exchange --



Cancel

Add

New Corporate Parent

Stock Symbols and Stock Exchange Information

Add New...

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
TE	New York Stock Exchange (NYSE)	 

Cancel

Save

Home Applications Maintenance Contact Management Communities

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

Corporate Parents

- Please identify if any affiliates of the applicant are 'Immediate Corporate' and/or 'Ultimate Corporate' Parents. Select 'Not Applicable' if this does not apply.
- Select the 'Add' button to enter the information of the applicant's Corporate Parent that were not previously identified.
- Select the pencil icon to edit any details for newly added Corporate Parents.
- Select the trash can icon to delete any newly added Corporate Parents.
- Select the 'Preview and Submit' button to proceed to the preview screen to review changes prior to submittal.

Company Name	Stock symbol/Ticker symbol/CUSIP number	Immediate Corporate	Ultimate Corporate	Not Applicable
Test Company		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Four		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test 2 LLC		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test 4		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Wind Test Three		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

+ Add

Cancel Save

Click Save.

Click **Edit** to add a Corporate Structure Organizational Chart showing the corporate ownership and affiliated company relationships. This document should include all Affiliates (PJM and non-members), the investors and shareholders with percentages of ownership of each.

Corporate Structure Organizational Chart

No Files to display.

Edit

Wind Test, LLC - Affiliate Disclosure

Affiliate Disclosure ⓘ

Corporate Structure Organizational Chart

Uploaded files such as Corporate Structure Organizational Chart (**including percentages of ownership**) are acceptable for this section.

If applicable, review previously uploaded files. Select the trash can icon to delete files that are no longer applicable.

No Files are linked please upload file(s).

Edit Corporate Structure Organizational Chart

Please upload a Corporate Structure Organizational Chart (**including percentages of ownership**). Corporate Structure ORG chart should be inclusive of ALL affiliated entities (PJM Member or non-member entities).

Upload Files Or drop files

Accepted file types: .XLS, .DOC, .DOCX, .PDF

Click Upload Files and then click Save.

Cancel **Save**

After all Affiliate Disclosure updates are saved, check the box next to the certification statement.

I certify the provided information is true, correct, and complete to the best of my knowledge, information, and belief.

Click **Submit**.

I certify the provided information is true, correct, and complete to the best of my knowledge, information, and belief.

Updating Your Voting Member

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Voting Member Change Request section of the dashboard to make changes.

Wind Test, LLC - Voting Member Change Request

Voting Member

- Select the affiliated member from the dropdown for which you are requesting to be the Voting Member. If you do not see the preferred Voting Member in the drop down, please navigate to your [Affiliate Disclosure](#) page to review and update your Member affiliations.
- Select the 'Submit' button to complete your request.

* Voting Member
Wind Test, LLC

Additional Comments

Select the affiliated Member that you are requesting to become the Voting Member. Click **Submit**.

(Note: The dropdown will default to your existing Voting Member.)

- This page shows the active requests for your selected company, you can view completed or denied requests with the status filter.
- To start a new maintenance request for your company, select the [New Request](#) button.
- If edits are needed after a maintenance request is submitted please contact [Membership Maintenance](#).

Wind Test, LLC

Review your pending request on the Company Overview page.

Requests	Status	Date Submitted	Due Date	Actions
All	All			
Voting Member	Submitted	02.28.2020		

Requesting a Company Name Change

To change a Member name on PJM Interconnection agreements, an officer, authorized representative or maintenance manager must provide the appropriate state documentation to initiate this request.

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Company Name Change section of the dashboard to make changes.

Current Company Name
Wind Test, LLC

Wind Test, LLC - Company Name Change

- Enter your new company name along with the effective date of this change.
- Additional documentation will be required for this process on the next page.

* New Company Name

* Effective Date
Feb 28, 2020

Next

Enter the New Company Name and the Effective Date of the change. Click **Next**.

Wind Test, LLC - Company Name Change

In order to update the company name on file with PJM, members are required to submit official state documentation reflecting this change. This documentation ensures PJM has the correct and proper name as filed with their incorporated state and that all documents executed between PJM and its members have the correct and proper name listed.

PJM will accept any of the following to meet the state documentation requirement:

- Certificate of Amendment of Articles of Incorporation
- Certificate of Formation
- Certificate of Incorporation
- Certificate of Existence
- Certificate of Limited Partnership
- Certification of Organization
- Certificate of Filing

Once confirmed by PJM's Member Liaison, additional documentation will be sent to you via DocuSign to complete the name change process.

If you have any questions, please contact MembershipForms@pjm.com.

Upload

Or drop files

Accepted file types: .pdf

Upload official documentation as instructed on the screen. Click **Next** to submit your request.

After completion of upload, please select 'Next' button to submit your corporate name change request.

Next

Company Overview

- This page shows the active requests for your selected company, you can view completed or denied requests with the status filter.
- To start a new maintenance request for your company, select the New Request button.
- If edits are needed after a maintenance request is submitted please contact [Membership Maintenance](#).

Wind Test, LLC

Review your pending request on the Company Overview page.

New Request

Requests	Status	Date Submitted	Due Date	Actions
All	All			
Name Change	Submitted	02.28.2020		

Managing Sub Accounts

Members have the ability to establish more than one account, often referred to as Sub Accounts, needed for their business purposes.

ADDING A SUB ACCOUNT

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Sub Accounts section of the dashboard to make changes.

Home Applications Maintenance Contact Management Communities ▾

Wind Test, LLC - Sub Accounts

Sub Accounts

- To add new sub account select 'Request New Sub Account' button.
- To remove sub account select an individual sub account's 'Request Removal' button.

Click [here](#) to view pending requests.

Click Request New Sub Account.

Request New Sub Account

Account Name	Short Name	Actions
No Sub Accounts to show		

No Pending Requests to show		
-----------------------------	--	--

Back

Wind Test, LLC - Sub Accounts

***Required**

Member Company Name
Wind Test, LLC

* Please enter the Sub Account name
Energy 1

Display Name
Wind Test, LLC (Energy 1)

* Sub Account description
Energy 1 is a division of Wind Test that will perform transactions with PJM.

If you wish to change the CAMs on this account, please contact [Membership Maintenance](#)

User Name	First Name	Last Name
JJ_WIND	John	Jones
HS_WIND	Howard	Smith


I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Note: The format for a Sub Account name is the Member Company Name (Sub Account name). For example: Wind Test, LLC (Energy 1).

Enter the Sub Account name. Enter the Sub Account description. Check the certify check box and click **Submit**.

Pending Requests

Upon submitting the request, you will be directed to the page below where you can review your pending changes.

Request	Submitted Date	Actions
Sub Accounts - Wind Test, LLC Request to Add Sub Account, Wind Test, LLC (Energy 1), on 2/28/2020	02.28.2020	

REMOVING A SUB ACCOUNT

Wind Test, LLC - Sub Accounts

Sub Accounts

- To add new sub account select 'Request New Sub Account' button.
- To remove sub account select an individual sub account's 'Request Removal' button.

Click [here](#) to view pending requests.

Click on the **Request Removal** button for the Account Name you wish to remove.

Account Name	Short Name	Actions
Wind Test Billing	WTBILL	<input type="button" value="Request Removal"/>
Wind Test Gen	WTGEN	<input type="button" value="Request Removal"/>

Remove Sub Account

Are you sure you want to request removal of this Sub Account?

Click **Submit** to confirm.

Pending Requests

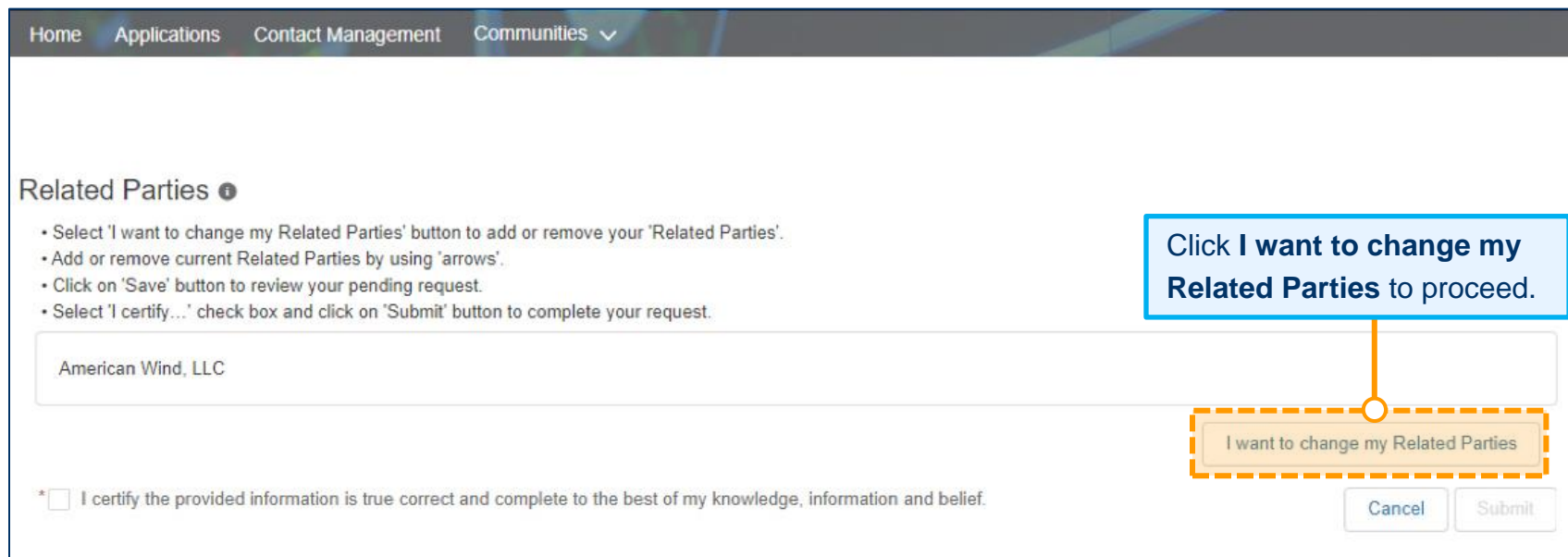
Upon submitting the request, you will be directed to the page below where you can view your pending changes.

Request	Submitted Date	Actions
SubAccounts -Wind Test, LLC Request to Remove Sub Account, Wind Test Billing, on 3/2/2020	03.02.2020	<input type="button" value="Cancel"/>

Changing Related Parties for Your Company (Electric Distribution Sector Only)

Note: This section only applies to Members in the Electric Distribution sector and will not appear in the dashboard for members of other sectors.

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Related Parties section of the dashboard to make changes.



Related Parties ⓘ

- Select 'I want to change my Related Parties' button to add or remove your 'Related Parties'.
- Add or remove current Related Parties by using 'arrows'.
- Click on 'Save' button to review your pending request.
- Select 'I certify...' check box and click on 'Submit' button to complete your request.

Current PJM Members

- Allegheny Electric Cooperative, Inc.
- Blue Ridge Power Agency, Inc.
- Borough of Butler, Butler Electric Division

Current Related Parties

- American Wind, LLC
- American Municipal Power, Inc.

Add or remove current Related Parties by using the arrows. Click **Save** when finished.

Related Parties ⓘ

- Select 'I want to change my Related Parties' button to add or remove your 'Related Parties'.
- Add or remove current Related Parties by using 'arrows'.
- Click on 'Save' button to review your pending request.
- Select 'I certify...' check box and click on 'Submit' button to complete your request.

American Wind, LLC

I want to change my Related Parties

Check the box next to the certification statement if you are satisfied with the previewed selections. Click **Submit**.

(Note: If you are not satisfied with the previewed selections and need to make changes, click **I want to change my Related Parties** to make additional changes.)

Pending Requests

Company	Action	Status
American Municipal Power, Inc.	Add	Under Review

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Cancel Submit

Requesting To Update Market Participation Status in PJM Markets

Members can submit a request to change how they participate in PJM's markets or submit a request to become an active Market Participant.

SUBMITTING A MARKET PARTICIPANT REQUEST

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Market Participant section of the dashboard to submit the request.

The screenshot displays the 'Wind Test, LLC - Market Participant' dashboard. At the top, it shows the company name and membership type (Voting Member). An 'Application Progress' bar indicates the current status is 'In Progress', followed by 'Submitted', 'Under Re...', 'Completed', and 'Cancelled'. Below this, a text box explains that to become an active Market Participant or change the current status, several online forms must be collected and reviewed by PJM. A table lists these forms: Market Participant, Credit Contacts, Credit Application, and Affiliate Disclosure. Each form has a 'Get Started' button with a right-pointing arrow. A blue callout box with a white background and a blue border points to the 'Get Started' buttons, containing the text: 'Click **Get Started** for each of the online forms to submit the required information.' A dashed orange box highlights the 'Get Started' buttons for the 'Market Participant', 'Credit Contacts', and 'Credit Application' rows.

Form Name	Get Started	Date Submitted	Last Updated
Market Participant	Get Started →		03.18.2021
Credit Contacts	Get Started →		03.18.2021
Credit Application	Get Started →		03.18.2021
Affiliate Disclosure	Get Started →		03.18.2021

Member Maintenance User Guide

Company Wind Test, LLC

Membership Type Voting Member

Application Progress

In Progress Submitted Under Re... Completed Cancelled

In order to become an active Market Participant or change your Member's current Market Participation, the following online forms will need to be collected and reviewed by PJM.

Market Participant	Get Started →		
Credit Contacts	Completed		
Credit Application	Continue →	Date Submitted:	Last Updated: 09.27.2021
Affiliate Disclosure	Completed	Date Submitted:	Last Updated: 09.27.2021

The online forms can be saved as a draft if you need to complete the form at a later time. Click **Continue** to review and continue working on a previously saved form.

* I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Check the box next to the certification statement when you have completed the online forms. Click **Submit**.

Company Wind Test, LLC

Membership Type Voting Member

Application Progress

Submitted Under Re... Completed Cancelled

In order to become an active Market Participant or change your Member's current Market Participation, the following online forms will need to be collected and reviewed by PJM.

Market Participant	View	Date Submitted: 09.27.2021	Last Updated: 09.27.2021
Credit Contacts	View	Da	
Credit Application	View	Da	
Affiliate Disclosure	View	Date Submitted: 09.27.2021	Last Updated: 09.27.2021

After submitting the Market Participant request, you can navigate to view the status of the application as well as the information that was submitted.

Adding, Editing or Removing Principals (MARKET PARTICIPANTS ONLY)

Members can add, edit or remove Principals for their company.

ADDING A PRINCIPAL

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Principal section of the dashboard to make changes.

Principals

Please enter information for the Top 5 most senior Principals for your company per PJM Tariff, Attachment 1.

- "Principal" shall mean (i) the chief executive officer or senior manager that controls or directs the financial affairs and is responsible for managing commodity and derivatives market risks, and (v) the officer or senior manager of the Participant, or a director or manager at an entity that controls or invests in the Participant), then for that Participant the term Principal shall mean that individual, or the senior officer or manager of that entity, that performs such function.

Click **Add New**. Each Principal requires a Principal Type. If a Principal Type is not displayed, use the Edit features to add Principal Types (see [Editing a Principal](#) section).

Add New...

First Name	Last Name	Date of Birth	Principal Type	Employer (if different than Member)	Actions
No records to display.					

Create & Assign Principal

Search for an existing contact. If that contact does not exist then create new.

Search by email...

Mary Tester
mary.test@test.com

Search by email and select a person at your company who is already a contact with PJM to be assigned the role of Principal contact. Alternatively, click **Create Contact** to add a completely new Principal contact.

Create & Assign Principal

Search for an existing contact. If that contact does not exist then create new.

William Wind - williamwind@test.com

Cancel View Contact

In this case, an existing contact has been selected. Click on **View Contact**.

Create New Principal

* Required

* First name: Sue

* Last name: Smith

* Title: CFO

* Date of Birth: Jan 1, 1970

* Email: sue.smith@test.com

Employer (if different than Member): Other

* Employer Name: Wind Test Parent Company

* Select Principal Type(s)

- The chief executive officer or senior manager that controls or directs strategy for the Participant.
- The chief legal officer or general counsel (may include external counsel).
- The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.
- The chief risk officer or senior manager responsible for managing commodity and derivatives market risks.
- The officer or senior manager responsible for or to be responsible for transactions in the applicable PJM Markets.

* Please provide a list of all previous companies for which this person has held the role of principal during the last five years.

Not applicable

Complete the information in the pop-up form. Click **Add**. If you do not have all of the required information, click **Back** to return to the previous screen or **Cancel** to exit out of the form.

If the Employer for the Principal is a different company than the Member Company, search the list for other existing Member Companies or select **Other**. If Other is selected, enter the Employer Name in the additional box.

You can select one or more Principal Types as applicable for the contact.

Member Maintenance User Guide

After clicking **Add** on the previous screen, you will be directed to the Pending New/Update Requests page. New Principal assignments will appear in this section until the form is certified and submitted (see below).

Pending New/Update Requests					
First Name	Last Name	Birth Date	Role	Company	Actions
William	Wind	01.04.1977	• The chief executive officer or senior manager that controls or directs strategy for the Participant.		
Sue	Smith	01.01.1970	• The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.	Wind Test Parent Company	

Principal Type Status
If a Principal has been provided for the required role, a **✓** will display. Otherwise, a **✗** will display.

✓	The chief executive officer or senior manager that controls or directs strategy for the Participant.
✗	The chief legal officer or general counsel (may include external counsel).
✓	The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.

The Principal Type Status shows the Principal Types that have been provided or are pending.

Principal Type Status
If a Principal has been provided for the required role, a **✓** will display. Otherwise, a **✗** will display.

✓	The chief executive officer or senior manager that controls or directs strategy for the Participant.
✓	The chief legal officer or general counsel (may include external counsel).
✓	The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.
✓	The chief risk officer or senior manager responsible for managing commodity and derivatives market risks.
✓	The officer or senior manager responsible for managing the Participant's information security risks.

Certify
 certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Once individuals for all Principal Types have been provided, check the box next to the certification statement and click **Submit**.

You will not be able to submit the form until all Principal Types are provided. You can exit out of the form to continue updating information at a later time. All information will remain in the Pending New/Update Requests status until you certify and click **Submit**.

REMOVING A PRINCIPAL





1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Principal section of the dashboard to make changes.

Principals

Please enter information for the Top 5 most senior Principals for your company per PJM Tariff, Attachment Q, sections II.A.7 and II.E.7. (See definition below for 5 required roles)

- "Principal" shall mean (i) the chief executive officer or senior manager that controls or directs strategy for the Participant, (ii) the chief legal officer or general counsel, (iii) the chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant, (iv) the chief risk officer or senior manager responsible for managing commodity and derivatives market risks, and (v) the officer or senior manager responsible for or to be responsible for transactions in the applicable PJM Markets. If, due to the Participant's business enterprise, structure or otherwise, the functions attributed to any of such Principals are performed by an individual or entity separate from the Participant (such as a risk management department in an affiliate, or a director or manager at an entity that controls or invests in the Participant), then for that Participant the term Principal shall mean that individual, or the senior officer or manager of that entity, that performs such function.

[Add New...](#)

First Name	Last Name	Date of Birth	Principal Type	Emp (more than Member)	
William	Wind	01.04.1977	<ul style="list-style-type: none">• The chief executive officer or senior manager that controls or directs strategy for the Participant.		 
Mary	Tester	04.19.1980	<ul style="list-style-type: none">• The chief legal officer or general counsel (may include external counsel).		 

Click on the **trash can icon**.


Remove

Are you sure you want to remove this Contact as Principal?



[Cancel](#) [Remove](#)



Confirm you want to remove the contact as a Principal, then click **Remove** to continue or **Cancel** to cancel the request.

Pending Remove Requests

William Wind has been removed as a principal. 



Principal Type Status






If a Principal has been provided for the required role, a  will display. Otherwise, a  will display.

	The chief executive officer or senior manager that controls or directs strategy for the Participant.
	The chief legal officer or general counsel (may include external counsel).

After clicking **Remove**, you will be taken to the Pending Remove Requests page. Requests to remove Principals will appear in the Pending Remove Requests section until the form is certified and submitted (see below).

Principal Type Status

If a Principal has been provided for the required role, a  will display. Otherwise, a  will display.

	The chief executive officer or senior manager that controls or directs strategy for the Participant.
	The chief legal officer or general counsel (may include external counsel).
	The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.
	The chief risk officer or senior manager responsible for managing commodity and derivatives market risks.
	The officer or senior manager responsible for or to be responsible for transactions in the applicable PJM Markets.

The Principal Type Status shows whether a type has been provided or is pending. Follow the [Adding a Principal](#) instructions to provide Principals for all types.

Once individuals for all Principal Types have been provided, check the box next to the certification statement and click **Submit**.

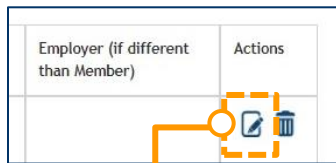
Certify

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

You will not be able to submit the form until all Principal Types are provided. You can exit out of the form to continue at a later time. All information will remain in the Pending New/Update Requests or Pending Remove Requests status.

EDITING A PRINCIPAL

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Principal section of the dashboard to make changes.



Click on the **edit** icon.

You can select one or more Principal Types as applicable for the contact.

After clicking **Save**, you will be taken to the Pending New/Update Requests page. Updates will appear in this section until the form is certified and submitted (see on next page).

Principal Contact Update

*** Required**

* First name: Ed
* Last name: Tester

* Title: Chief Risk Officer
* Date of Birth: Jun 1, 1960

* Email: ed.testster@test.com
Employer (if different than Member): -- Select a Company --

* Select Principal Type(s)

- The chief executive officer or senior manager that controls or directs strategy for the Participant.
- The chief legal officer or general counsel (may include external counsel).
- The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.
- The chief risk officer or senior manager responsible for managing commodity and derivatives market risks.
- The officer or senior manager responsible for or to be responsible for transactions in the applicable PJM Markets.

* Please provide a list of all previous companies for which this person has held the role of principal during the last five years.
None

Update the information in the pop-up form. Click **Save**.

If the Employer for the Principal is a different company than the Member Company, search the list for other existing Member Companies or select **Other**. If Other is selected, enter the Employer Name in the additional box.

Pending New/Update Requests					
First Name	Last Name	Date of Birth	Principal Type	Employer (if different than Member)	Actions
Ed	Tester	06.01.1960	<ul style="list-style-type: none"> • The chief executive officer or senior manager that controls or directs strategy for the Participant. • The chief risk officer or senior manager responsible for managing commodity and derivatives market risks. 		

You will not be able to submit the form until all Principal Types are provided. You can exit out of the form to continue at a later time. All information will remain in the Pending New/Update Requests or Pending Remove Requests status.

Principal Type Status

If a Principal has been provided for the required role, a ✓ will display. Otherwise, a ✗ will display.

✓	The chief executive officer or senior manager that controls or directs strategy for the Participant.
✓	The chief legal officer or general counsel (may include external counsel).
✓	The chief financial officer or senior manager that controls or directs the financial affairs and investments of the Participant.
✓	The chief risk officer or senior manager responsible for managing commodity and derivatives market risks.
✓	The officer or senior manager responsible for or to be responsible for transactions in the applicable PJ

Once individuals for all Principal Types have been provided, check the box next to the certification statement and click **Submit**.

Certify

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.



Requesting To Create a Principal Agent Declaration of Authority (DOA)

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Principal Agent DOA section of the dashboard to make changes.

The image shows two screenshots of a form. The top screenshot shows the 'Yes' button highlighted with a dashed orange border. A callout box points to it with the text: 'Confirm you have communicated with a PJM Client Manager and click **Yes** to continue.' The bottom screenshot shows the 'No' button highlighted with a dashed orange border. A callout box points to it with the text: 'If you have not communicated with a PJM Client Manager, click **No** and provide additional information. A case with your Client Manager will be created.' Below the 'No' button in the bottom screenshot is a text field labeled '*Additional Information'.

Have you communicated with a PJM Client Manager to discuss the specifics of this Principal Agent DOA request?
Note: This will expedite the DOA process and help to ensure the request is processed properly.

Yes No

Confirm you have communicated with a PJM Client Manager and click **Yes** to continue.

Have you communicated with a PJM Client Manager to discuss the specifics of this Principal Agent DOA request?
Note: This will expedite the DOA process and help to ensure the request is processed properly.

Yes No

*Additional Information

If you have not communicated with a PJM Client Manager, click **No** and provide additional information. A case with your Client Manager will be created.

Refer to the [Principal Agent Declaration of Authority User Guide](#) for detailed information on the form.

Requesting To Update Corporate Company Information

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to submit the request. Use the drop-down arrows to select. Then click **New Request**.
3. Click **Get Started** in the Corporate Company Information section of the dashboard to make changes.

The screenshot shows a web form with two main sections. The first section, 'Corporate Address', contains a table with one row of address information and an 'Update' button. The second section, 'Member Stock Symbols and Stock Exchange Information', contains a table with four rows of stock symbol and exchange data, each with edit and delete icons. Below the table are three input fields for CUSIP, NAICS code, and Number of Employees. A 'Submit' button is located at the bottom right, highlighted by a dashed orange box. A blue callout box with a white background and blue border contains the text: 'If changes are not needed, click **Submit**.' An orange line connects the callout box to the 'Submit' button.

Corporate Address	Actions
12345 update test Audubon, PA, 19403 United States	<input type="button" value="Update"/>

Member Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
testttt	Other - testing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
sf2101	Other - pjn	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
test	New York Stock Exchange (NYSE)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
testttt	Other - 123	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

CUSIP

*North American Industry ClassificationSystem (NAICS) code

*Number of Employees

Wind Test, LLC - Corporate Company Information

- To update company name, navigate to the company name change on the main Maintenance Landing Page.
- Update corporate company address.
- Update Member Stock Symbol(s) and associated Stock Exchange Information.
- Update NAICS.
- Update Number of Employees.

If changes are needed to the Corporate Address, click **Update**.

Corporate Address

Corporate Address	Actions
12345 update test Audubon, PA, 19403 United States	<input type="button" value="Update"/>

Member Stock Symbols and Stock Exchange Information

[Add New...](#)

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
testttt	Other - testing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
sf2101	Other - pjw	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
test	New York Stock Exchange (NYSE)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
testttt	Other - 123	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

CUSIP

*North American Industry ClassificationSystem (NAICS) code

54544

*Number of Employees

74

Create New Corporate Address

*** Required**

*** Is your corporation located in the USA?**

Yes
 No

*** Corporate Address Line 1**
12345 update test

Corporate Address Line 2

*** City**
Audubon

*** State/Providence/Territory**
Pennsylvania

*** Postal Code**
19403

*** Country**
United States

Update Corporate Address information. Click **Add** when finished.

Cancel Add

Member Maintenance User Guide

Wind Test, LLC - Corporate Company Information

- To update company name, navigate to the company name change on the main Maintenance Landing Page.
- Update corporate company address.
- Update Member Stock Symbol(s) and associated Stock Exchange Information.
- Update NAICS.
- Update Number of Employees.

Corporate Address

Corporate Address	Actions
12345 update test Audubon, PA, 19403 United States	<input type="button" value="Update"/>

Member Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
testttt	Other - testing	<input type="button" value="Add New..."/>  
sf2101	Other - pjm	 
test	New York Stock Exchange (NYSE)	 
testttt	Other - 123	 

In the Actions column, click the **pencil** icon to edit the Stock Symbol information.

In the Actions column, click the **trash can** icon to delete the Stock Symbol information.

CUSIP

*North American Industry ClassificationSystem (NAICS) code

*Number of Employees

Wind Test, LLC - Corporate Company Information

- To update company name, navigate to the company name change on the main Maintenance Landing Page.
- Update corporate company address.
- Update Member Stock Symbol(s) and associated Stock Exchange Information.
- Update NAICS.
- Update Number of Employees.

Corporate Address

Corporate Address	Actions
12345 update test Audubon, PA, 19403 United States	<input type="button" value="Update"/>

To add new Stock Symbol, click **Add New**.

Member Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
testttt	Other - testing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
sf2101	Other - pjm	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
test	New York Stock Exchange (NYSE)	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
testttt	Other - 123	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

CUSIP

* North American Industry Classification System (NAICS) code

* Number of Employees

Create New Stock Symbol

* Required

Enter Stock Symbol and select Stock Exchange from the dropdown, then click **Add**.

* Stock Symbol/Ticket symbol

* Stock Exchange

-- Select a Stock Exchange --

Cancel Add

- To update company name, navigate to the company name change on the main Maintenance Landing Page.
- Update corporate company address.
- Update Member Stock Symbol(s) and associated Stock Exchange Information.
- Update NAICS.
- Update Number of Employees.

Corporate Address

Corporate Address	Actions
12345 update test Audubon, PA, 19403 United States	<input type="button" value="Update"/>

Member Stock Symbols and Stock Exchange Information

Stock Symbol/Ticker Symbol	Stock Exchange	Actions
testttt	Other - testing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
	Other - pjm	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
	New York Stock Exchange (NYSE)	
	Other - 123	

Enter or update CUSIP, North American Industry Classification System (NAICS) code and Number of Employees.

When finished making all changes, click **Submit**.

CUSIP	* North American Industry ClassificationSystem (NAICS) code	* Number of Employees
<input type="text"/>	<input type="text" value="54544"/>	<input type="text" value="74"/>

Adding or Removing Company Account Managers (CAMs) for Your Company

DESIGNATING A COMPANY ACCOUNT MANAGER

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**

Company Account Manager **Get Started**
Designate or remove an individual from the role of CAM.

Company Name Change **Get Started**
Request a corporate name change.

Company Withdraw **Get Started**
Initiate the request to withdraw from PJM membership.

Change Voting Member **Get Started**
Request a change to your Voting Member.

Manage Sub Accounts **Get Started**
Request to add or remove Sub Account.

Wind Test, LLC - Company Account Managers

Wind Test, LLC

- Select an account from the above drop down to view associated CAMs.
- Each account is required to have a minimum of 2 CAMs.
- To add a new CAM, please select the 'Add New' button.
- To remove an individual from the role of CAM, select the 'Revoke' button.

User Name	First Name	Last Name	Actions
-----------	------------	-----------	---------

Create New Company Account Manager

* Required
A user must have an existing account in order to be designated as a CAM.

* Username

If the user does not have a username please have them visit [Account Manager](#) and create a new account.

* First name * Last name

If new CAM should be added to all Member subaccounts, select the check box 'Add for all Accounts'

Add for all Accounts

Cancel Add

Complete the information in the pop-up form. Click **Add**.
(Note: A person must have an existing Account Manager user account to be designated as a CAM.)

Wind Test, LLC - Company Account Managers

Wind Test, LLC

- Select an account from the above drop down to view associated CAMs.
- Each account is required to have a minimum of 2 CAMs.
- To add a new CAM, please select the 'Add New' button.
- To remove an individual from the role of CAM, select the 'Revoke' button.

Add New...

User Name	First Name		
HS_WIND	Howard		
JJ_WIND	John	Jones	Revoke

After clicking **Add** on the previous screen, you will be directed to the page below. Under Pending Requests, you will see the request you submitted to add a new CAM for the account you selected. Check the box next to the certification statement and click **Submit**.

Pending Requests

Request	Submitted Date	Actions
CAM - Add New CAM Wind, Test for Wind Test, LLC	03.10.2020	<input type="checkbox"/>
CAM - Add New CAM User, Guide for Wind Test, LLC	02.28.2020	<input type="checkbox"/>
CAM - Revoke CAM Howard, Smith for Wind Test, LLC	03.02.2020	<input type="checkbox"/>

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Submit

REMOVING A COMPANY ACCOUNT MANAGER

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.

This screenshot shows the Maintenance dashboard with several request cards. A callout box points to the 'Get Started' button for the 'Company Account Manager' card.

- Company Account Manager**: Designate or remove an individual from the role of CAM. *Callout: Click **Get Started** in the Company Account Manager section of the dashboard to make changes.*
- Company Name Change**: Request a corporate name change.
- Company Withdraw**: Initiate the request to withdraw from PJM membership.
- Change Voting Member**: Request a change to your Voting Member.
- Manage Sub Accounts**: Request to add or remove Sub Account.

This screenshot shows the 'Wind Test, LLC - Company Account Managers' page. A callout box points to the 'Revoke' button in the Actions column of the table.

Home Applications Maintenance Contact Management Communities ▾

Wind Test, LLC - Company Account Managers

Wind Test, LLC

- Select an account from the above drop down to view associated CAMs.
- Each account is required to have a minimum of 2 CAMs.
- To add a new CAM, please select the 'Add New' button.
- To remove an individual from the role of CAM, select the 'Revoke' button.

User Name	First Name	Last Name	Actions
HS_WIND	Howard	Smith	<i>Callout: Click Revoke for the person you wish to remove.</i>

Revoke Access

Are you sure you want to remove this Company Account Manager?

Please remove CAM from all associated accounts.

Check the box by the removal confirmation statement to remove the CAM from all associated accounts (Sub Accounts) if applicable or leave unchecked. Click **Revoke**.

Wind Test, LLC - Company Account Managers

Wind Test, LLC

- Select an account from the above drop down to view associated CAMs.
- Each account is required to have a minimum of 2 CAMs.
- To add a new CAM, please select the 'Add New' button.
- To remove an individual from the role of CAM, select the 'Revoke' button.

After clicking **Revoke**, a Pending Requests section will appear on the page where you can view your request to revoke the person from the CAM role. Check the box next to the certification statement and click **Submit**.

User Name	First Name	Last Name	Actions
HS_WIND	Howard	Smith	<input type="button" value="Revoke"/>
JJ_WIND	John	Jones	<input type="button" value="Revoke"/>

Pending Requests

Request	Submitted Date	Actions
CAM - Revoke CAM Howard, Smith for Wind Test, LLC	03.10.2020	<input checked="" type="checkbox"/>
CAM - Add New CAM Wind, Test for Wind Test, LLC	03.10.2020	<input type="checkbox"/>
CAM - Add New CAM User, Guide for Wind Test, LLC	02.28.2020	<input type="checkbox"/>
CAM - Revoke CAM Howard, Smith for Wind Test, LLC	03.02.2020	<input type="checkbox"/>

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Withdrawal Request for Your Company

1. Sign in and select **Maintenance** ([see page 2 for details](#)).
2. Select the company for which you wish to make the changes. Use the drop-down arrows to select. Then click **New Request**.

Company Account Manager
Designate or remove an individual from the role of CAM.

Affiliate Disclosure
Request updates to Member and non-member affiliates.

Company Name Change
Request a corporate name change.

Company Withdraw
Initiate the request to withdraw from PJM membership.

Manage Sub Accounts
Request to add or remove Sub Account.

Click **Get Started** in the Company Withdraw section of the dashboard to make changes.

I intend to withdraw my company from PJM.

I acknowledge that all tool access for all company accounts and subaccounts, except MSRS and eCredit, will be changed to read-only upon receipt of the withdrawal submittal.

I acknowledge that this submittal does not constitute the withdrawal. PJM will verify that no current or future positions will need to be performed prior to PJM accepting the withdrawal.

I acknowledge that there is a 90-day wait period from date of submittal. After the 90-day period you must contact [Membership Maintenance](#).

If your Member company is a Load Serving Entity, please notify all the utilities/EDCs in whose footprint you have served load.

*Reason for Withdrawal
Example: Maintenance User Guide

I certify the provided information is true correct and complete to the best of my knowledge, information and belief.

Complete the required fields and click **Submit**.