

Rosters and Voting Application Enhancements

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Stakeholder Process and Engagement

January 2025

Enhancements	Timing	Who May Be Affected
<ul style="list-style-type: none"> Enhancements to communications related to roster requests Streamlining roster requests for secured groups Enhanced automation between PJM systems to align the Voting Application with upstream changes to Membership and user accounts 	January 30, 2025	Roster representatives, Roster Managers, and Contact Managers



- Enhanced communications for roster requests and new Roster Managers
 - Improved clarity and formatting of existing emails, with additional instructions and reference materials
 - Reminder emails for pending roster requests
 - Additional information for new Roster Managers assigned to the role
 - Outreach to Contact Managers needing to assign a Roster Manager

Benefit: Additional information and clarity on the process to complete roster requests

- Automatic expiration of pending roster requests after 30 days
 - Roster requests that Roster Managers do not respond to will be cancelled after 30 days and would require a new request submission

Benefit: Removal of dormant and outdated requests

- Consistent Process for Secured Groups Roster Requests
 - Roster requests for secured groups will be added to the [Roster Request Form](#) on PJM.com and routed to Roster Managers following PJM approval. Currently, only open stakeholder groups are available on the Roster Request Form.
 - An additional approval will be needed by PJM due to the secured nature of the group.

Benefit: Streamlined and consistent process for requesting roster updates to secured groups.

- Stakeholders may submit requests using the Roster Update Form and will no longer need to manually contact the facilitation team to initiate a secured group roster request.
- Roster Managers will use the Roster Manager feature in the Voting Application to approve roster updates for secured and open stakeholder groups.

Enhanced automation between PJM systems

- Enhanced automation to align Voting Application with changes involving Membership status (in Salesforce or the Membership Management Community) or user accounts (in Account Manager)
 - PJM Member withdrawals and terminations
 - Termination of user accounts in Account Manager

Benefit: Consistency between data in the Voting Application, Salesforce, and Account Manager and reduced manual processing for support teams

- Rosters associated with a terminated PJM user account or terminated PJM member company will be automatically removed
- Roster Managers will no longer need to delete rosters for terminated users
- Automation will provide for processing efficiencies when appropriate criteria is met

- [Voting Tool Page](#)
 - Resources on voting, rosters, and designating proxy voters
 - Roster Manager training and information
- [Membership Management Community](#)
 - Contact Managers may make changes to designated Roster Managers
- [Account Manager](#)
 - Users may request access to Voting Read/Write and Roster Administrator
- [Voting_Support@pjm.com](#)
 - For assistance as needed

Presenter:

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Assistance:

Voting Support
voting_support@pjm.com

A green speech bubble containing a white question mark, positioned above a blue speech bubble with three horizontal lines, which is in turn positioned above a yellow circle containing contact information.

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Member Hotline

(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com

**PROTECT THE
POWER GRID
THINK BEFORE
YOU CLICK!**



Be alert to
malicious
phishing emails.

Report suspicious email activity to PJM.
(610) 666-2244 / it_ops_ctr_shift@pjm.com

