Updates on Rosters and Voting Application

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Stakeholder Process and Engagement

December 2024

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Upcoming Actions

Action	Timing	Who May Be Affected
Roster clean up effort	**January 24, 2025**	Roster Managers, CAMs and roster representatives
Enhancements to Voting Application and PJM communications regarding roster requests	**Q1 2025**	Roster Managers and roster representatives

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Voting Roster Clean Up

- **Accurate roster information streamlines stakeholder participation.**
  - Up-to-date rosters support necessary access to the Voting Application for Members.
  - The Members Committee roster is used for the Voting Application as well as Board elections and approvals of access to secure groups.

- **Roster Manager tab in Voting Application now allows Members to easily update roster information.**
  - Rosters can be viewed, sorted, and updated by designated Roster Managers.

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Criteria for Roster Clean Up

- **To address invalid roster records, PJM will conduct a one-time, manual roster clean up on January 31, 2025. This clean up will apply to**:
  - Roster representatives associated with a PJM user account that has been terminated. (An active PJM user account is needed for meeting registration and access to PJM tools)
  - Rosters for Standing Committees and other voting groups
    - Members Committee (MC), Markets and Reliability Committee (MRC), Market Implementation Committee (MIC), Operating Committee (OC), Planning Committee (PC), and Risk Management Committee (RMC)
    - Senior Task Forces and Subcommittees reporting directly to the MRC

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Stakeholder Profile in Account Manager

- The Stakeholder Profile has been added to user accounts in Account Manager to indicate who a user is representing in the stakeholder process.
- PJM will utilize the refreshed roster data to initially populate the new Stakeholder Profile in Account Manager.
  - This will be limited to a one-time initial population.
  - Stakeholders will be able to maintain their own data within the Account Manager tool going forward.
  - The Stakeholder Profile is available to all stakeholders, not just roster representatives.
  - The future direction is to leverage the Stakeholder Profile data for meeting registration and meeting minute attendance.

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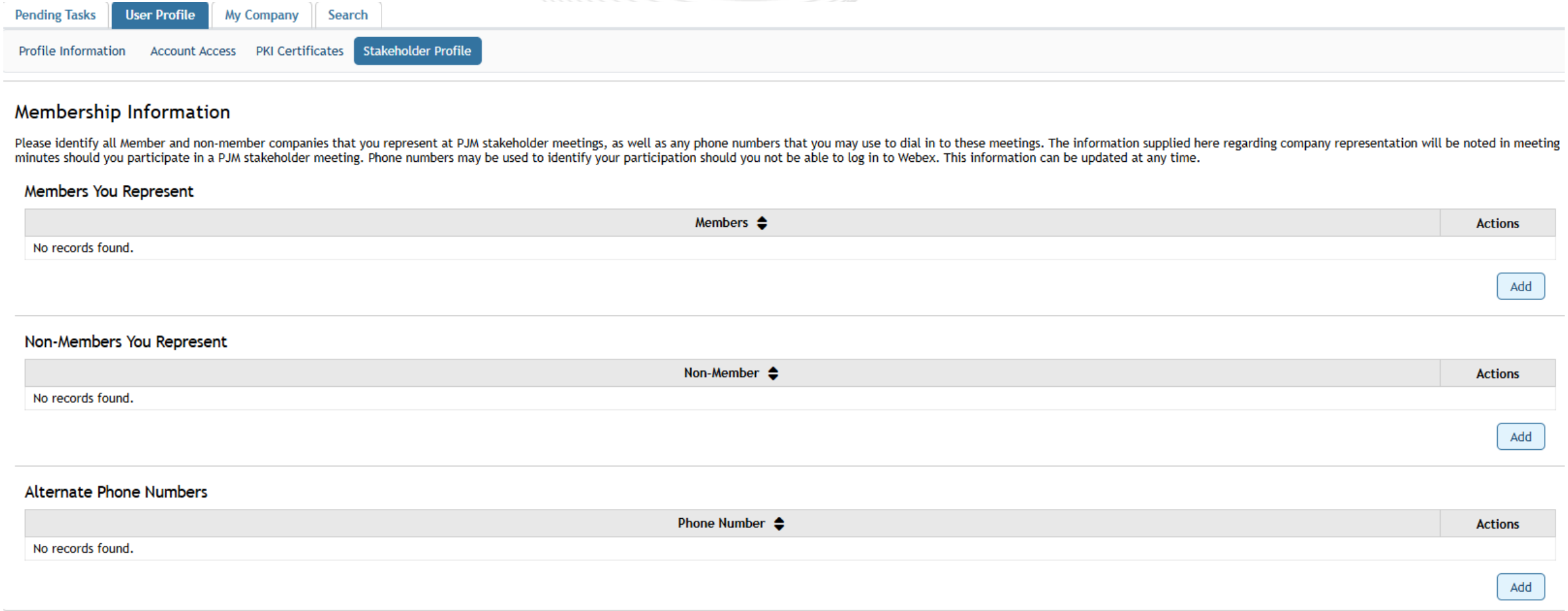
Stakeholder Profile in Account Manager



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Voting Application Enhancements Planned for 2025

- Enhanced communications for roster requests and new Roster Managers
  - Additional instructions for completing roster requests
  - Reminder emails for pending roster requests
  - Additional information for new Roster Managers
- Automatic expiration and cancelation of pending roster requests after 30 days
- Enhanced automation in the Voting Application to reflect Membership changes and corresponding roster updates or terminations
  - PJM Member withdrawals
  - Corporate family change of Voting / Affiliate Member
  - Account Manager terminations or access removals

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Resources

- Voting Tool Page
  - Resources on voting, rosters, and designating proxy voters
  - Roster Manager training and information
- Membership Management Community
  - Contact Mangers may make changes to designated Roster Managers
- Voting_Support@pjm.com
  - For assistance as needed

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Contact

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