Rosters and Voting Application Enhancements

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Stakeholder Process and Engagement

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Enhancements	Timing	Who May Be Affected
• 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 Mangers 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  Benefit: Removal of dormant and outdated requests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 Mangers 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

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Assistance:

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