

User Account Management Quick Guide



September 2025

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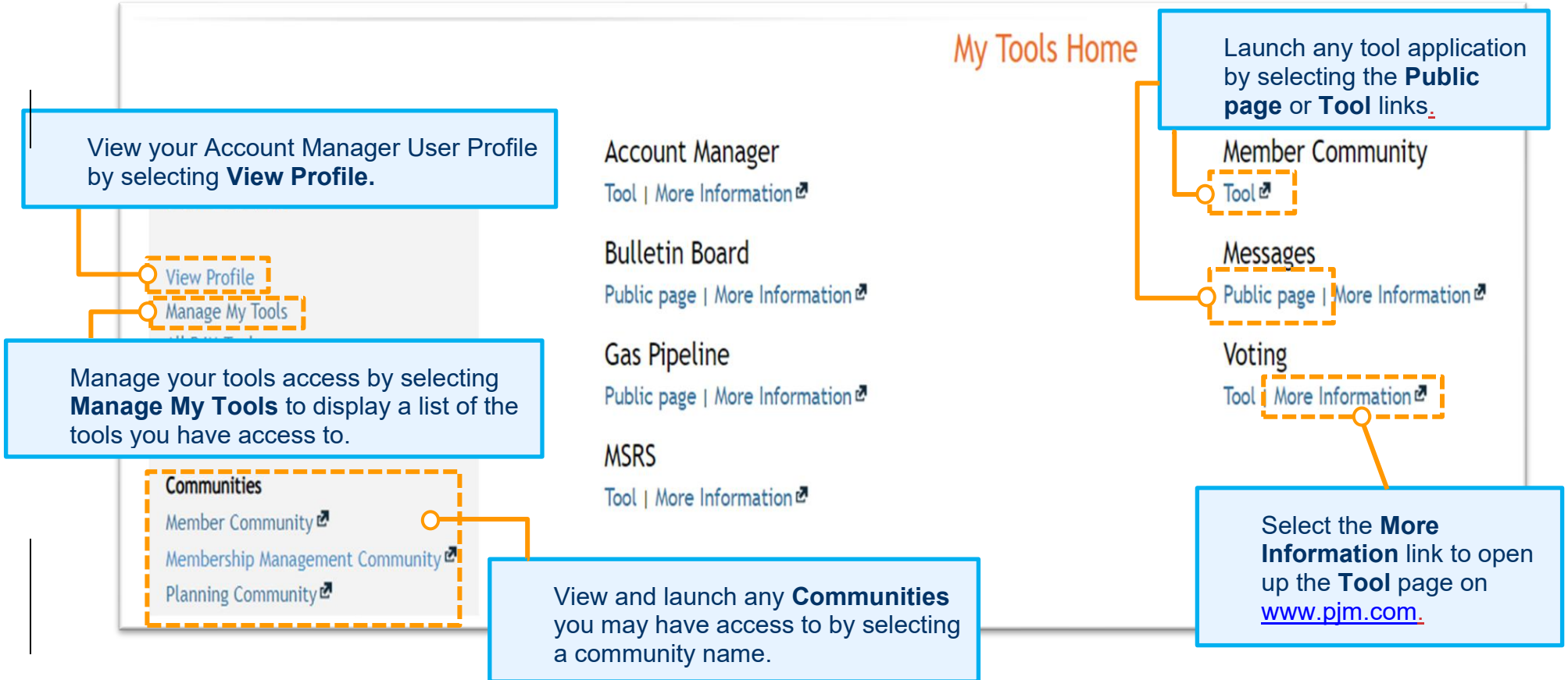
User Account Management

User Account Management

Once you have an established user account in Account Manager, you can manage your contact information and access to PJM Tools. The steps below show the different functions a user can perform on the **My Tools Home** page, **Account Manager User Profile Account Information** page, and the **Account Manager Account Access** page.

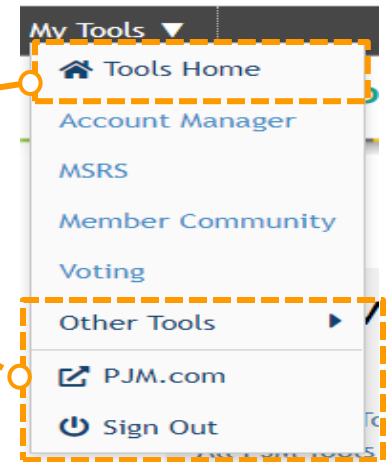
MY TOOLS HOME

Once you sign in to the **Account Manager Single Sign-On (SSO)** page, you will be directed to the PJM **My Tools Home** page. From this page, you can:



User Account Management

Additionally, on the PJM **My Tools Home** page, there is a **My Tools** drop-down menu that provides another way for you to navigate to tools, a link to www.pjm.com and a link to **Sign Out** of the PJM **My Tools Home**.



User Profile – Account Information

On the **User Profile – Profile Information** page, you can manage your contact and profile information.

You can update:

- Job title
- Phone number
- Email address
- Employed-As field
- Password
- Security Questions
- Accounts Status
- Account Type

User Account Management

User Profile

Profile Information Account Access PKI Certificates Stakeholder Profile

Contact Information

First name *

John

Last name *

Doe

Job title

Contractor

Employer *

Account Manager Test Account

Employed as *

Contractor

Phone *

1234567890

Email *

UserGuide@testcompany.com

Edit Profile

To make changes to your profile—such as updating your password, modifying security questions, or requesting a name change—click the **Edit Profile** button, located at both the top and bottom right of the page.

User Information

Username *

UserGuide

Account type

User

Account status

Active

Terminate date

12/31/9999

Security questions answered

Yes

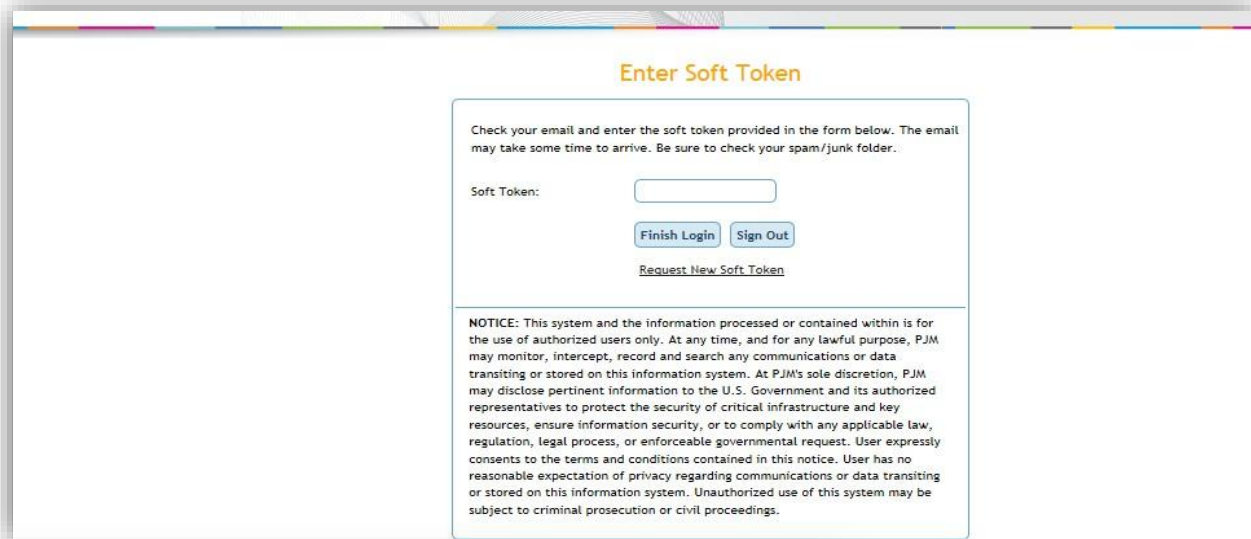
No

Password

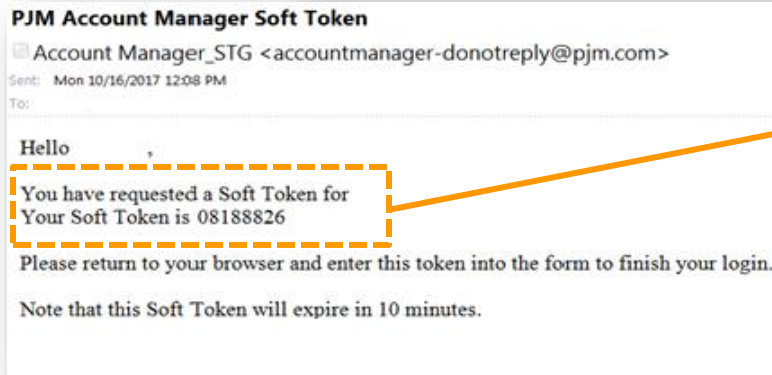
Click "Edit Profile" to update your password.

User Account Management

When you click the **Edit Profile** button, you will be prompted to enter a soft token.



The screenshot shows a web form titled "Enter Soft Token". At the top, it says "Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder." Below this is a text input field labeled "Soft Token:". Underneath the input field are two buttons: "Finish Login" and "Sign Out". Below the buttons is a link: "Request New Soft Token". At the bottom of the form is a "NOTICE" section with the following text: "NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system. At PJM's sole discretion, PJM may disclose pertinent information to the U.S. Government and its authorized representatives to protect the security of critical infrastructure and key resources, ensure information security, or to comply with any applicable law, regulation, legal process, or enforceable governmental request. User expressly consents to the terms and conditions contained in this notice. User has no reasonable expectation of privacy regarding communications or data transiting or stored on this information system. Unauthorized use of this system may be subject to criminal prosecution or civil proceedings."



Check your email associated with user account in Account Manager for the soft token.

Please check your spam/junk folder if the automated soft token email is not in your inbox before clicking **Request New Soft Token** link.

User Account Management

Once the soft token is validated, your user profile will open, and you may proceed with making edits.

The screenshot shows a 'User Profile' page with several sections and callout boxes:

- User Profile** (Main header)
- Profile Information** (Active tab), Account Access, PKI Certificates, Stakeholder Profile
- Contact Information** section:
 - First name: John
 - Last name: Doe (highlighted by a callout box)
 - Job title: Contractor (highlighted by a callout box)
 - Employer: Account Manager Test Account
 - Employed as: Contractor (highlighted by a callout box)
 - Phone: 1234567890 (highlighted by a callout box)
 - Email: UserGuide@testcompany.com (highlighted by a callout box)
- User Information** section:
 - Username: UserGuide
 - Account type: User (highlighted by a callout box)
 - Account status: Active (highlighted by a callout box)
 - Terminate date: 12/31/9999
- Security questions answered: Yes No
- Buttons: Cancel, Save (highlighted by a callout box)

Callout Box 1 (Contact Information): In the **Contact Information** section, you can update your last name, job title, employment type, phone number, and email address.

Callout Box 2 (User Information): In the **User Information** section, you can update the account type from *User* to *System Account*. The *Account Status* field also provides the option to terminate your user account, if necessary.

Callout Box 3 (Security): The password cannot be changed until **security answers** are submitted and "**Employed as**" field is set

Callout Box 4 (Save): After reviewing your changes for accuracy, click **Save**, located at both the top and bottom right of the page.

User Account Management

Once the soft token is validated, your user profile will open, and you may proceed with making edits.

The password cannot be changed until **security answers** are submitted and "Employed as" field is set

Security questions answered

Yes No

Password

New password

Re-enter new password

Password Requirements

- Must be 10-16 characters
- At least one uppercase letter, one lowercase letter, one number and one special character
- Special character can only be () ! \$ % ^ & * _ { } [] |
- Cannot include username, first name or last name

In the **Password** section, you can update your password as needed. Ensure that your new password meets all specified requirements.

Security Questions

For your protection, these will help us verify your identity in the future. Answer a minimum of three questions below. Capitalization is not important.

Q1 *
Who is your favorite football team? ▼

A1 *
.....

Q2 *
What is your father's middle name? ▼

A2 *
....

Q3 *
Who is your favorite baseball team? ▼

A3 *
.....

You can manage your security questions and answers to utilize the **Forgot Password** link on the sign-in screen. Click **Submit** if you updated your security questions and/or answers.

After reviewing your changes for accuracy, click **Save**, located at both the top and bottom right of the page.

Cancel Save

Feedback

User Account Management

References

- > [Account Managers](#)
- > [History](#)

The **User Profile – Profile Information** page also includes a **References** section, where you can access links to view your Company Account Managers (CAMs) and account history.

When you click the **Account Managers** link, the **Account Manager** page displays your CAM's contact information for your main company account.

Account ↕	First Name ↕	Last Name ↕	Phone ↕	Email ↕
PJM Training, LLC	Julissa	Craven	610-555-1212	j.craven@pjm.com
PJM Training, LLC	Levi	Smrekar	610-555-1212	ls@pjm.com

Please contact your CAM when you have questions or need assistance with your user account.

When you click the **History** link, the **History** page displays the history of actions taken on the user account (e.g., changes to contact information, password changes, tool access requests).

Timestamp ↕	Event ↕	Details	Updated By ↕
5/25/2021 10:16	Employed As Change	Changed employed as from Consultant to Contractor.	LSTRNSUMACAM
5/25/2021 10:15	Phone Number Change	Changed phone number from 215-555-5555 to 610-666-1212.	LSTRNSUMACAM
5/25/2021 10:14	Last Name Change	Changed last name from Plissken-Doh to Plissken.	LSTRNSUMACAM
5/25/2021 10:13	Last Name Change Approved	Approved last name change from Plissken to Plissken-Doh.	LSTRNSUMACAM
5/25/2021 10:13	Last Name Change Request	Requested last name change from Plissken to Plissken-Doh.	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted Member Community Public access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted System Map Read Only access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:12	Access Created	Granted MSRS Read Only access for PJMTR (Account ID: 3,006,024).	LSTRNSUMACAM
5/25/2021 10:11	Employed As Change	Changed employed as from null to Consultant.	LSTRNSUMACAM
5/25/2021 09:04	Title Change	Changed title from fake to Tester.	LSTRNSUMACAM
3/20/2021 00:30	Locked	Account locked by password expired.	SYSTEM
11/11/2020 15:13	Password Reset	Password was reset.	JACROWNTRN
11/11/2020 15:12	Unlocked	Account unlocked.	JACROWNTRN
11/10/2020 13:50	Locked	Account locked by Admin.	LSTRNSUMACAM
11/10/2020 13:50	Password Reset	Password was reset.	LSTRNSUMACAM



Records Per Page: 15 << < (1 of 4) > >> [Reset](#)


User Account Management

User Profile – Account Access

On the **User Profile – Account Access** page, you can manage your account access. You will have the ability to view and manage your current access in the data tables.

Account ID	Account	Account Shortname
32947	Account Manager Test Account	AMTEST

Actions	Tool	Access Type	Status	Effective Date	Terminate Date
 	PJM	Public	Active	09/03/2025	12/31/9999

Edit your existing access by clicking the **pencil** icon  next to the tool and submit a **Request Access Level Change** using the drop-down menu. You can also submit comments to provide justification for the request to your CAM. Click **Submit**.

Request Access Level Change

Tool: Planning Center


Current Access: Gen Model Read Only

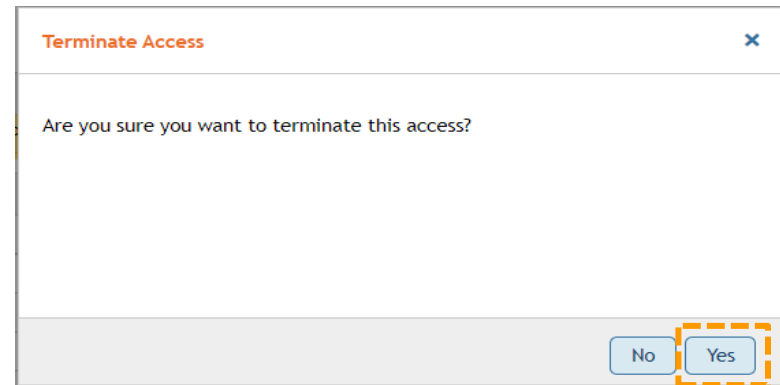
Request Access Change: Gen Model Read Write

Comments:

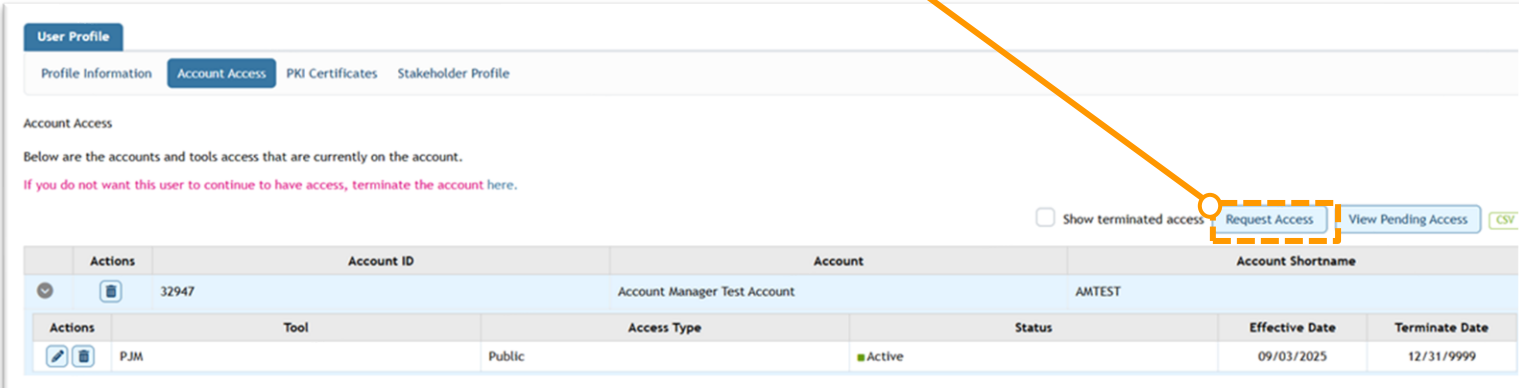
Cancel Submit

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Terminate Access by clicking the **trash can**  icon next to the tool for which you no longer require access. You will be prompted to validate this request by clicking **Yes**.



You can request additional tool access for your account by clicking the **Request Access** button.



User Profile

Profile Information Account Access PKI Certificates Stakeholder Profile

Account Access

Below are the accounts and tools access that are currently on the account.

If you do not want this user to continue to have access, terminate the account here.

Show terminated access **Request Access** View Pending Access CSV

Actions	Account ID	Account	Account Shortname
	32947	Account Manager Test Account	AMTEST

Actions	Tool	Access Type	Status	Effective Date	Terminate Date
	PJM	Public	Active	09/03/2025	12/31/9999

User Account Management

You will be redirected to the **Request Access** page, where you can select additional access.

Request Access

Accounts

PJM DEMO Company 2 [DEMCO2]

Add Accounts

Access	Selected Access
Billing Line Item Transfer Read Only	
Bulletin Board Read Only	
Bulletin Board Read/Write	
Capacity Exchange Read Only	
Capacity Exchange Read/Write	
Certificate Based Authentication Opt-In	
Competitive Planner Read Only	
Competitive Planner Read/Write	
Competitive Planner Submitter	
Data Miner 2 Non-Member API	

Comments

Please use the comments field to provide information to the Company Account Manager to help determine what access you require.

Next

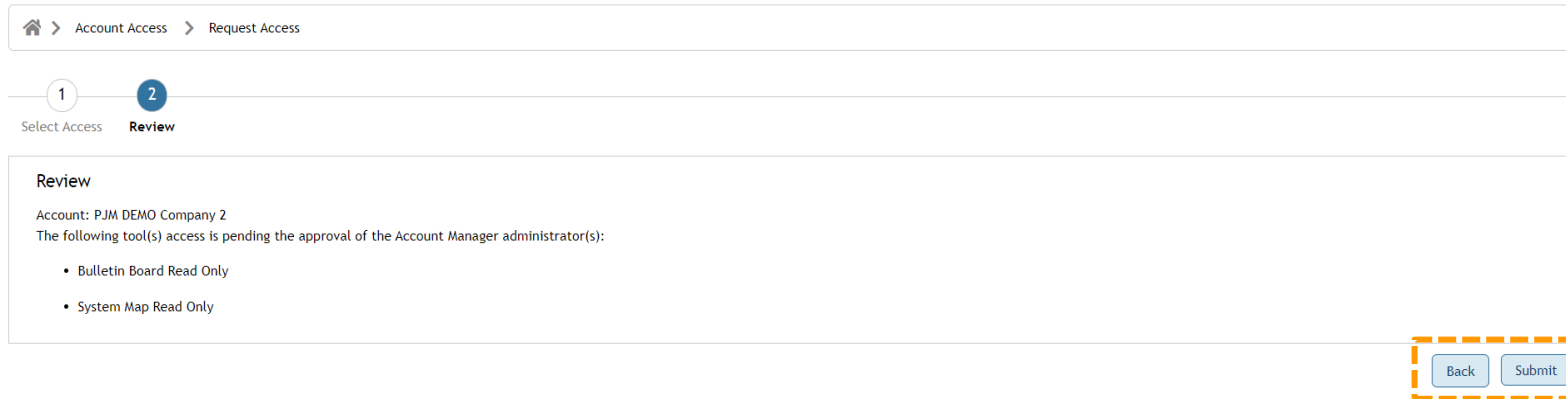
Feedback

Tool availability is dependent upon your company's line of business with PJM.

Select tool access under the *Access* column, then click the center **double-arrow** icon to add it to the *Selected Access* column. When you have completed selecting additional access, click **Next** to proceed.

User Account Management

On the **Review** screen, review tool access selected. If you missed any tools, click the **Back** button. Follow the previous steps to select additional access, and then click **Submit** to finalize this request.



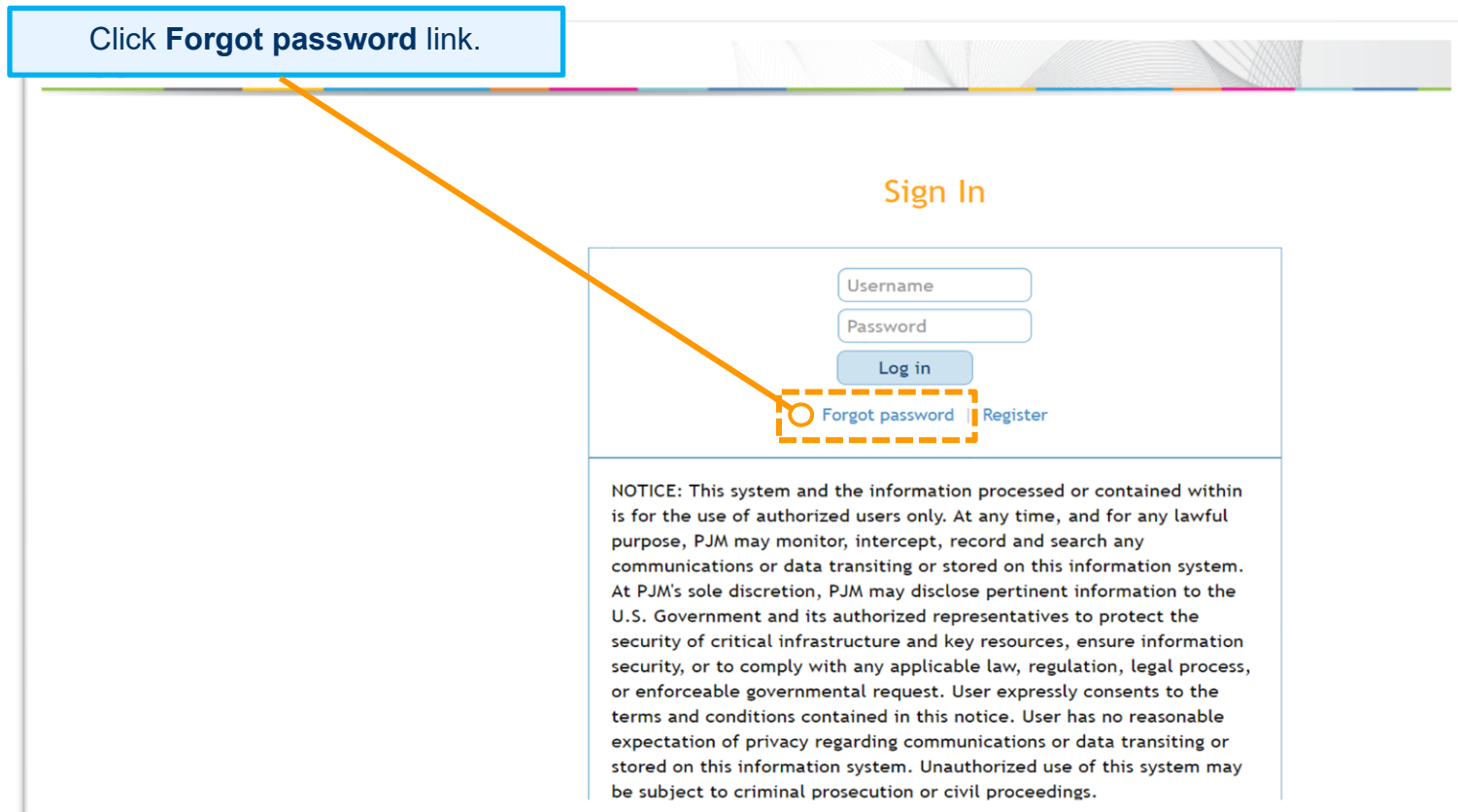
You will receive the following success message after submitting the request. Any additional access will be pending your CAM's approval prior to use.



Please contact your CAM if you have questions or need assistance for any new or pending access requests.

Reset Password Using Forgot Password Link

Users may request to reset their own account password by selecting the **Forgot password** link on the **Sign-In** page. To enable the self-service password reset feature, you must have security questions and answers saved. If your user account was created prior to this feature, you can set your security questions/answers on the **Profile Information** page in Account Manager.



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Enter your username and click **Submit**.

The screenshot shows the 'Forgot Password' form. At the top left is the 'pjm Account Manager' logo. The form has a title 'Forgot Password'. Below the title is a text input field with the placeholder text 'Please enter your username *'. To the right of this field is a 'Submit' button. Both the input field and the button are enclosed in orange dashed boxes.

Enter the answers to your two security questions, then click **Submit Answers**.

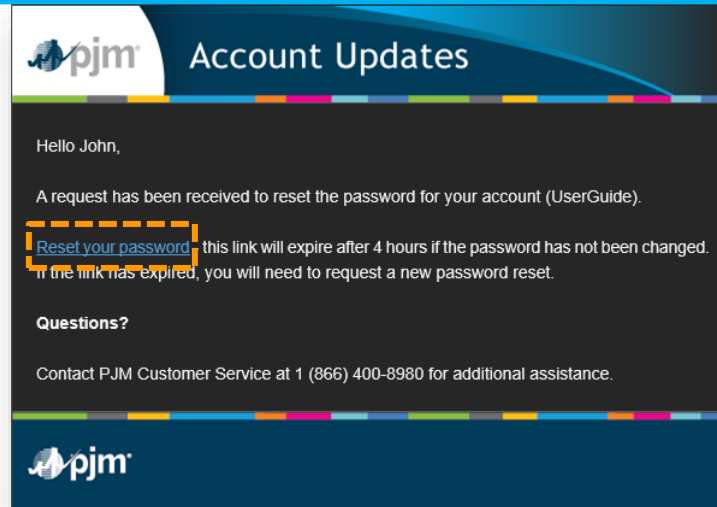
The screenshot shows the 'Forgot Password' form with the security questions section. The 'Please enter your username *' field now contains 'XXXXXXXX'. Below it is a 'Submit' button. The security questions section is enclosed in an orange dashed box and contains two text input fields: 'What is the name of your current pet?' and 'What is your Dad's middle name?'. To the right of these fields is a 'Submit Answers' button, also enclosed in an orange dashed box.

You will receive the following message if your security questions were answered correctly.

The screenshot shows the confirmation message. At the top left is the 'My Tools' dropdown menu and the 'pjm Account Manager' logo. The message text is: 'Thank you for your request. You will receive an email to create your password. Please [Contact PJM](#) if you have any questions regarding your account.' A vertical 'Feedback' button is visible on the right side of the page.

User Account Management

Check your inbox for an automated email to reset your password. Click on the **here** link in the email to reset.



Password

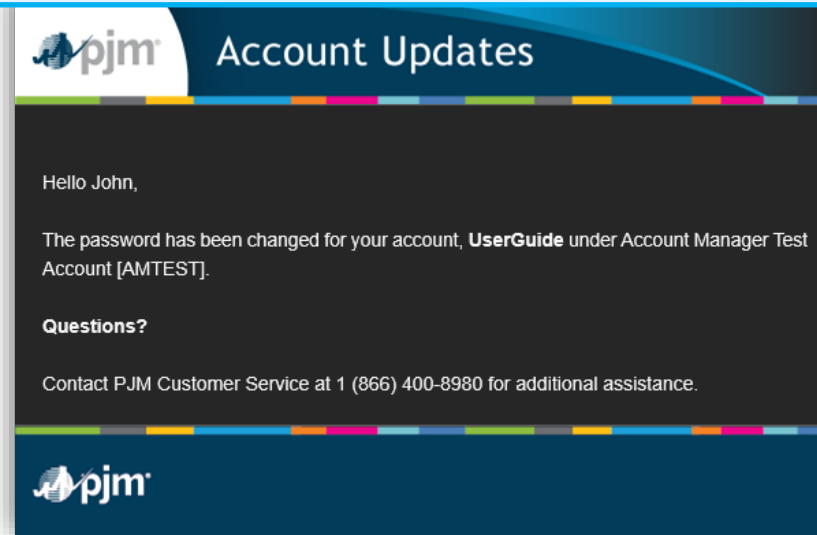
Choose Password *

- Must be 10-16 characters
- At least one uppercase letter, one lowercase letter, one number and one special character
- Special character can only be () ! \$ ^ ~ : . , < > = ? ^ _ { } [] |

Re-enter new password *

After clicking on the link in the email, you will see this screen. Enter a new password for the account and click **Save**.

You will get an email confirmation that your password was changed, and you should now be able to log in with the new password.



Multifactor Authentication

Multifactor Authentication (MFA) is a feature that adds an extra layer of protection by requiring more than one method of authentication. The first authentication step is to enter the user ID and password. Upon successful login, there will be a prompt for a soft token (also known as a one-time password).

SOFT TOKEN/ONE-TIME PASSWORD

The soft token is PJM's implementation of the second authentication factor. It is a randomly generated eight-digit number that is sent to the email address associated with the user ID in Account Manager. The soft token expires 10 minutes from the time it was emailed. A user can request a new soft token or sign out of the **Soft Token** page. Once a

User Account Management

user authenticates through this double-authentication method, the user will not be asked to enter a soft token again for that device.

A maximum of five device profiles per user can be stored. If a sixth device profile is detected, the oldest profile will be removed from the list, and the user will have to enter a soft token again in order to access the application from that device.

Device profiles are based on the following attributes:

- Browser (Edge vs. Chrome)
- Installed font sizes
- Installed system resolution
- Device time zone

If a user signs out from the **Soft Token** page, they will be redirected to the main tools login page.

HOW TO LOG IN USING MFA

Sign in

Username:

Password:

[Sign In](#)

[Forgot Password](#)

[Register](#)

NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system, and may disclose such communications or data to the U.S. Government and its authorized representatives. Anyone using this system expressly consents to the terms and conditions contained in this notice. Individuals using this computer system without authority, or in excess of their authority, are advised that if monitoring reveals possible improper or criminal activity, system personnel may provide the

Log in to Account Manager by entering your case-sensitive username and password combination on the *Single Sign-On* screen. Then click the **Sign-In** button.

User Account Management

After a successful login, you will be prompted to **Enter Soft Token.**

The screenshot shows a web page titled "Enter Soft Token". At the top, it says "Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder." Below this is a form with a label "Soft Token:" and an input field. Underneath the input field are two buttons: "Finish Login" and "Sign Out". Below the buttons is a link: "Request New Soft Token". At the bottom of the page, there is a "NOTICE" section with the following text: "NOTICE: This system and the information processed or contained within is for the use of authorized users only. At any time, and for any lawful purpose, PJM may monitor, intercept, record and search any communications or data transiting or stored on this information system. At PJM's sole discretion, PJM may disclose pertinent information to the U.S. Government and its authorized representatives to protect the security of critical infrastructure and key resources, ensure information security, or to comply with any applicable law, regulation, legal process, or enforceable governmental request. User expressly consents to the terms and conditions contained in this notice. User has no reasonable expectation of privacy regarding communications or data transiting or stored on this information system. Unauthorized use of this system may be subject to criminal prosecution or civil proceedings."

PJM Account Manager Soft Token

Account Manager_STG <accountmanager-donotreply@pjm.com>

Sent: Mon 10/16/2017 12:08 PM

To:

Hello,

You have requested a Soft Token for
Your Soft Token is 08188826

Please return to your browser and enter this token into the form to finish your login.

Note that this Soft Token will expire in 10 minutes.

Check your email associated with user account in Account Manager for the soft token.

Please check your spam/junk folder if the automated soft token email is not in your inbox before clicking **Request New Soft Token** link.

The screenshot shows a web page titled "Enter Soft Token". At the top, there is a blue box with the text: "Copy the soft token from the email and paste it in the Soft Token box." An orange line points from this box to a text input field labeled "Soft Token:" which contains seven dots. Below this field are two buttons: "Finish Login" and "Sign Out". A second blue box at the bottom left contains the text: "Click **Finish Login** to gain access to Account Manager." An orange line points from this box to the "Finish Login" button. Below the buttons is a link that says "Request New Soft Token". At the bottom of the page is a large "NOTICE" section with several lines of text regarding system security and user consent.

Enter Soft Token

Check your email and enter the soft token provided in the form below. The email may take some time to arrive. Be sure to check your spam/junk folder.

Soft Token:

[Request New Soft Token](#)

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Click **Finish Login** to gain access to Account Manager.