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Contact Management

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Create & Assign

MEMBER ROLES

UNASSIGNED MEMBER ROLES

CONTACTS

Actions	Last name	First name	Member	Role	Type
	Search	Search	All	All	All
	Morales	Luz	Voting Member 1	Affiliate Disclosure Signer	Primary
	O'Brien	See	Voting Member 1	Affiliate Disclosure Signer	Alternate

Create and assign contacts with associated roles.

Search by first or last name.

Edit or delete role assignments.

To export the data, select the **Export: CSV** link on the Member Roles, Unassigned Member Roles or Contacts tab.

Select **Role Definitions** for descriptions of roles.

To add or remove a Contact Manager, select the **Attestation Form** and submit to PJM.

Create & Assign

MEMBER ROLES

UNASSIGNED MEMBER ROLES

CONTACTS

Member	Role	Type
Voting Member 5	ATTITUDE Disclosure Signer *	alternate
Voting Member 1	Authorized Representative	
Voting Member 5	Credit	alternate
Voting Member 5	Information Technology *	Primary
Voting Member 5	Officer Certification Form **	alternate
Voting Member 5	Officer of the Company **	Primary

Select the **Unassigned Member Roles** tab to view roles that haven't been assigned.

Create & Assign

MEMBER ROLES

UNASSIGNED MEMBER ROLES

CONTACTS

Actions	Last name	First name	Member	Employer	Title	Email	Phone
	Search	Search	All	All	Search	Search	Search
	Boyle	May	Voting Member 1		VP	vb@pjm.com	6105551213
	Boyle	Didi	Voting Member 5		VP	db@pjm.com	6105551414
	Contact	Harry	Voting Member 5		Vice President	hc@pjm.com	(605) 996-3963

Select the **Contacts** tab to view all contacts.

Edit contact information or delete all roles for contact.

Contacts that do not have a delete button are designated Contact Managers and can only be removed by completing and submitting the Attestation Form.

Sort by column.

Filter by column.

Contact Manager Quick Guide



Select **Create & Assign** to create contacts and assign roles.

Actions	Last name	First name	Member
	Search	Search	All
	Masias	Luz	Voting Member 1

Type in the text box to search for an existing contact. If the contact exists, select **View Contact**, then click on **Select Role(s)**.

Create a new contact or search for an existing contact

Create contact or search by email...

Cancel Create Contact

If the contact does not exist, select **Create Contact**.

After selecting **Create Contact**, fill in all fields noting (*) are required.

* Last name: megawatt * First name: Marty

* Title: Contact manager Employer (if different than Member): Electric utility

* Email: Marty.Megawatt@electric.com Group email:

* Phone: 610-555-1212 * Phone type: Cell

Alternate phone: Phone type: Select one

Comments:

Cancel Select Role(s)

After the fields have been updated, click on **Select Role(s)**.

* Select Member: Voting Member 1

* Select Role(s): 3 roles selected

Cancel Assign Role(s)

After clicking Select Role(s), select member company from drop down, select all roles that apply, click **Apply** then select **Assign Role(s)**.

Voting Member 1

Authorized Representative: ☐ Primary ☐ Alternate

Billing: ☐ Primary ☒ Alternate

Compliance: ☐ Primary ☒ Alternate

Cancel Save

To assign roles, select **Primary** or **Alternate** for each role. If the role has already been assigned to another contact, you will not be able to select a role. Click **Save**.