



# 2022 Annual Member Recertification

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Knowledge Management Center

Members Committee Webinar  
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Action Required	Deadline	Who May Be Affected
Complete Annual Member Recertification Items	<b>04/15/2022</b>	All Full Members
Complete Annual Officer Certification Form	<b>04/29/2022</b>	All Market Participants
Review FAQ material	<b>N/A</b>	All Full Members

- Full Members required to validate the following information annually
  - Sector Selection
  - Affiliate Disclosure Information
  - Related Party Information (Electric Distributor sector only)
  - Contact Managers
  - Company Account Manager (CAMs)
- Must be completed by a designated Officer, Authorized Representative, or Maintenance Manager
- Process defined in [Manual 33](#), Section 3

- Market Participants required to provide the following information
  - Annual Officer Certification Form
    - Must be completed by an Officer
    - Required each calendar year between January 1 and April 30
  - Principals
    - Utilized for Know Your Customer (KYC) processes (on-going)
- Per compliance with PJM Tariff, Attachment Q

Area	2022 Recertification Enhancements
<b>Annual Officer Certification Form</b>	Initiate DocuSign form from Membership Management Community using one of the following options: <ul style="list-style-type: none"><li>• Send directly to Officer (One recipient)</li><li>• Send to a designated person to complete and initial before sending to Officer for review and signature (Two recipients)</li><li>• Print, save, email capabilities documented in FAQ/user guide</li></ul>
<b>Principals</b>	<ul style="list-style-type: none"><li>• Community page redesign to improve editing and data entry functionality</li><li>• Designate type of Principal (CEO, CFO, CRO, etc.)<ul style="list-style-type: none"><li>• Market Participants required to provide type for all previously designated and new Principals</li></ul></li></ul>

# 2022 Recertification Tasks and Timeline

Required Tasks	Tool	Open Date	Due Date	Must be completed by
<ul style="list-style-type: none"> <li>• Sector Selection</li> <li>• Affiliate Disclosure</li> <li>• Related Parties</li> <li>• Contact Managers</li> <li>• CAMs</li> <li>• Principals*</li> </ul>	Membership Management Community	Beginning of January	April 15 <sup>th</sup>	<ul style="list-style-type: none"> <li>• Officer</li> <li>• Authorized Representative</li> <li>• Maintenance Manager</li> </ul>
Officer Certification Form*	Membership Management Community	Beginning of January	April 29 <sup>th</sup>	<ul style="list-style-type: none"> <li>• DocuSign form initiated by Officer, Auth Rep, or Maintenance Manager</li> <li>• Officer must initial and sign form</li> </ul>

\* Market Participants only

- Enhancement demonstration will be provided at the Dec. 16<sup>th</sup> Tech Change Forum.
- Review [Annual Recertification FAQ](#) for instructions on reviewing and changing current Officers, Authorized Representatives, or Maintenance Managers, if applicable as well as other FAQs.
- Communication will be sent when recertification opens in January.

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## Annual Member Recertification Process



### Member Hotline

(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com



# Appendix

- [Membership Management Community tool page](#)
  - Annual Recertification user guide
- Membership Management Community tool access provided to designated Officers, Authorized Representatives, or Maintenance Managers
  - [Form of Secretary Certificate](#) – Add designations
  - [Officer, Authorized Rep, Maintenance Manager Designation Form](#) – Add and revoke designations
  - [Form of Secretary Certificate FAQ](#)