Communities Roadmap

As of July 24, 2018
## 2018 Communities Roadmap

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### Membership Management Community: Contact Management

- **Member Feedback**
- **Production Go-Live**

### Legend
- Start Date
- End Date

[www.pjm.com](http://www.pjm.com)
• Solar and Wind data from Data Viewer Full Q&A

• Capacity Exchange XML Samples Now Available Full Q&A

• Will the operational data be still available in the current link after August 2018?
http://www.pjm.com/pub/account/lmpgen/lmppost.html

Any plan to have it in data miner 2? Full Q&A
Recently Published Knowledge Articles

- Requesting Access to PJM Connect PERCS Secure SharePoint Site – See Article
- Request Demand Bid Services using PJM's Member Community – See Article
- PJM EMS Networking Rapid Response Team Procedure – See Article
- How do I change my member billing contact information? – See Article
Membership Management Community: Contact Management

**Before**

- Phone
- PJM.com/PJM Tools
- E-Mail

**Internal PJM Teams**

**After**

**Contact Managers**

**Internal PJM Teams**
Instituting a *member-managed* Contact Management tool provides the following:

- Enhanced security by establishing Contact Managers
- Transparent and centralized process
- Easy to maintain
- Managed by members who know their data best
- Improved data quality
- Flexible such that new roles can be identified and added in the future
- Not replacing Account Manager provisioning functionality
Contact Managers

• Contact Managers responsible for creating contacts and assigning roles

• Contact Attributes:
  – First and Last Name
  – Title
  – Employer, if different than Member
  – Phone Number & Alternate Phone Number
  – Phone Type (e.g., cell, office, other)
  – Individual Email
  – Group Email (optional)
  – Preferred Email Indicator (required only if both emails are provided)

• Required Roles: A primary contact and at least one alternate contact must be designated
### Full Member Roles

#### Required Roles
- Roster Manager (new)
- Billing*
- Credit*
- Officer Certification Form
- Legal (new)
- Officer of the Company
- Authorized Representative (new)
- Information Technology (new)

#### Optional Roles
- Treasury*
- Communications/Public Relations*
- Compliance*
- Audit

* Prepopulated with existing contacts
Roster Manager role will be identified in Contact Management. Roster Managers will then be set up by PJM in Voting tool.

- Authority to create and maintain rosters for all PJM stakeholder groups
  - Transparent and centralized process
  - Easy to maintain
  - Managed by members who know their data best
  - Improved data quality and validation
  - Easy and efficient process to add single meeting proxy voters
Next Steps

- Contact Managers have authority to maintain information in Membership Management Community
- Full Members need to designate Contact Managers
  - Form available on Membership Management Community tools page
  - Form distributed with email request for annual affiliate disclosures
- Membership Management Community updates will be provided at the Tech Change Forum
<table>
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<tr>
<th>Role</th>
<th>Definition</th>
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<tr>
<td>Roster Manager</td>
<td>The Roster Manager will have authority to update all stakeholder group rosters in PJM's Voting application for the member company.</td>
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<tr>
<td>Billing</td>
<td>The Billing Contact is responsible for the disposition of PJM's invoices (retrieve from MSRS, process for payment, respond to payment inquiries, i.e. breach notices, payment default notices, etc.).</td>
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<td>Credit</td>
<td>The Credit Contact is authorized to participate in activities related to collateral calls.</td>
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<td>Officer Certification Form</td>
<td>The Officer Certification Form contact will receive notification annually regarding the Officer Certification Form.</td>
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<tr>
<td>Legal</td>
<td>The Legal Contact is authorized to address questions regarding PJM legal agreements. The Legal Contact may the member company's counsel or legal contact.</td>
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<tr>
<td>Officer of the Company</td>
<td>An Officer of the Company that has the authority to sign PJM official documents and agreements binding the member company.</td>
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## Role Definitions

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<td>Authorized Representative</td>
<td>The Authorized Representative has the authority to sign PJM official documents and agreements binding the member company.</td>
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<tr>
<td>Information Technology</td>
<td>The Information Technology Contact is the main contact for any PJM technology related issues. In addition to established email distribution lists, change coordination notifications will be sent to the Information Technology contacts to ensure members receive information.</td>
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<tr>
<td>Treasury</td>
<td>The Treasury Contact is authorized to provide and answer questions regarding banking information.</td>
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<tr>
<td>Communications/Public Relations</td>
<td>The Communications/Public Relations Contact handles communications and public relations for the member company.</td>
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<tr>
<td>Compliance</td>
<td>The Compliance Contact is a Reliability Compliance contact for the member company. If a member company is a NERC registered entity, a contact must be assigned to this role.</td>
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<tr>
<td>Audit</td>
<td>The Audit Contact is used for verifying distribution of SSAE audit report and bridge/gap letters. The Audit Contact must work for the member or be a certified agent for the member. The Audit Contact cannot be an auditor from an external firm.</td>
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Product Details
The Member Community allows members to find answers to their questions, get the information they need when they need it, and resolve issues quickly and efficiently.

**Key Product Features**

- Research topics quickly and easily
- Submit questions, issues and requests to PJM
- Track the real-time status of your requests
- Initiate various processes for demand bid, generation transfers, etc.
The **Tech Change Forum Community** allows users to find information and collaborate with other users and PJM subject matter experts about PJM’s tools and initiatives. Discussions are based on topics covered within the monthly Tech Change Forum meetings.

**Key Product Features**

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM
The **Planning Community** will allow Transmission and Generation Owners to find information and collaborate with other users and PJM subject matter experts about Planning initiatives, proposal windows and process questions. Discussions are based on Planning topics.

**Key Product Features**

- Moderated discussion boards
- Research topics quickly and easily
- Submit questions, issues and requests to PJM
The Membership Management Community will allow companies to submit application information for PJM membership and maintain member level contact information.

**Key Product Features**

- **My Membership**
  - Track the real-time status of your membership application
  - Submit documentation for application

- **Contact Management**
  - Maintain member level contact information for certain roles identified by PJM