Membership Management Community
Contact Manager Education

Knowledge Management Center
October 3rd, 2018
October 15th, 2018
My Membership: A new easy to use online membership enrollment process.

Available now

Contact Management: A “one stop shop” for members to maintain member level contact information for their company.

Roster Manager | Billing | Treasury | Credit | Legal | Authorized Representative | IT

Available now
PJM’s new Contact Management feature in the Membership Management Community was released on August 30th.

- Access to the new feature is provided to Contact Managers for each member.
- Contact Managers can use the new feature to review and provide contacts for certain member level roles that have been identified by PJM.
- Updates to Credit, Treasury, and Billing contacts now done in Membership Management Community
- Does not replace any Account Manager provisioning functionality
Contact Manager Responsibilities

- Maintain up-to-date information in system
- Work within your company to identify the right people for the roles
  - Helps PJM increase engagement in PJM activities and communicate to the right people at your company
- Login prior to October 31\textsuperscript{st} and provide contacts for required 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
Member Roles

Select the **Member Roles** tab to view role assignments.

Create contacts and/or assign contacts to roles.

Search by last name or first 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 the **Unassigned Member Roles** tab to view roles that haven't been assigned.

Asterisk denotes required roles.
Select the **Contacts** tab to view all contacts.

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

Edit contact information

Delete all roles for a contact and if applicable, remove the contact from your company

<table>
<thead>
<tr>
<th>Actions</th>
<th>Last name</th>
<th>First name</th>
<th>Member</th>
<th>Employer</th>
<th>Title</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contact</td>
<td>Joe</td>
<td>Voting Member 2</td>
<td></td>
<td>consultant</td>
<td><a href="mailto:Imagin3@example.com">Imagin3@example.com</a></td>
<td>610-555-1212</td>
</tr>
<tr>
<td></td>
<td>Contact</td>
<td>Marty</td>
<td>Voting Member 2</td>
<td>test</td>
<td>consultant</td>
<td><a href="mailto:Imagin5@example.com">Imagin5@example.com</a></td>
<td>610-555-1212</td>
</tr>
<tr>
<td></td>
<td>Contact</td>
<td>John</td>
<td>Voting Member 2</td>
<td></td>
<td>consultant</td>
<td><a href="mailto:Imagin5@example.com">Imagin5@example.com</a></td>
<td>610-553-1212</td>
</tr>
<tr>
<td></td>
<td>Duck</td>
<td>Donald</td>
<td>Voting Member 2</td>
<td></td>
<td>consultant</td>
<td><a href="mailto:Imagin7@example.com">Imagin7@example.com</a></td>
<td>610-555-1212</td>
</tr>
</tbody>
</table>
|         | Mouse     | Mickey     | Voting Member 2 | My Employer | Analyst | Imagin2@example.com | 6015555666

Select the **Contacts** tab to view all contacts. [Image of Contact Management screen]
Type in the text box to search for an existing contact. If the contact exists, select View Contact, then click on Select Role(s).

If contact does not exist, select Create Contact

Fill in all required fields, click on Select Role(s)
After clicking Select Role(s), select member company from drop down, select all roles that apply, then select Assign Role(s).

To assign roles, select Primary or Alternate for each role. Click Save.
Additional Resources

- **Membership Management Community Tools Page**
  - Contact Management User Guide
  - Contact Management Quick Guide
  - Contact Manager Attestation Form

- **Tech Change Forum** – Contact Manager Educations Sessions
  - Wednesday October 3rd 11 – 12 EPT
  - Monday, October 15th 11 – 12 EPT

- **Questions?**
  - Please contact [membershipforms@pjm.com](mailto:membershipforms@pjm.com)
  - PJM Customer Service: (610) 666-8980 / (866) 400-8980
• PJM will review Contact Management FAQs
• Questions?
Appendix
## Role Definitions

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<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>
</tr>
<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>
</tr>
<tr>
<td>Credit</td>
<td>The Credit Contact is authorized to participate in activities related to collateral calls.</td>
</tr>
<tr>
<td>Officer Certification Form</td>
<td>The Officer Certification Form contact will receive notification annually regarding the Officer Certification Form.</td>
</tr>
<tr>
<td>Legal</td>
<td>The Legal Contact is authorized to address questions regarding PJM legal agreements. The Legal Contact may be the member company's counsel or legal contact.</td>
</tr>
<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>
</tr>
<tr>
<td>Role</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Authorized Representative</td>
<td>The Authorized Representative has the authority to sign PJM official documents and agreements binding the member company.</td>
</tr>
<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>
</tr>
<tr>
<td>Treasury</td>
<td>The Treasury Contact is authorized to provide and answer questions regarding banking information.</td>
</tr>
<tr>
<td>Communications/Public Relations</td>
<td>The Communications/Public Relations Contact handles communications and public relations for the member company.</td>
</tr>
<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>
</tr>
<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>
</tr>
</tbody>
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