



Roster Management

Megan McLaverty/Amanda Egan
Knowledge Management Center
October 23, 2018

- Roster Manager role will be identified in Contact Management.
- Those identified as Roster Managers will need to request Voting>Roster Administrator access in Account Manager
- Roster Managers will then be set up by PJM in Voting application.
 - 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

- Roster Managers will maintain rosters in the Voting Application (voting.pjm.com)
- Roster Managers will now see a new tab for labeled “Roster Manager”
- Roster Manager tab contains three sections for the maintenance of the rosters
 - Contacts
 - Roster
 - Designates

Contacts

Voting Registration Details **Roster Manager**

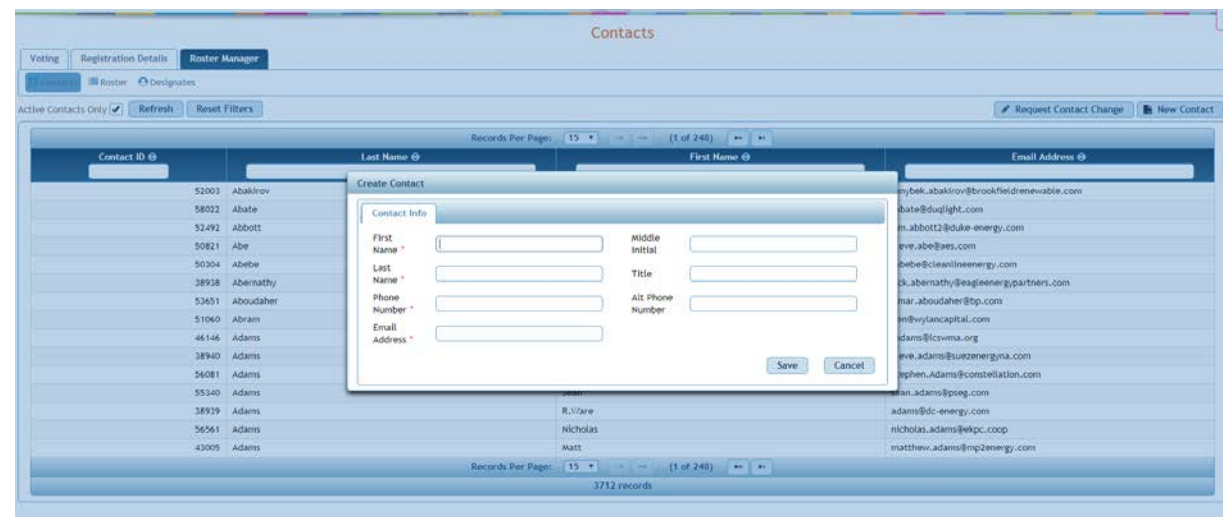
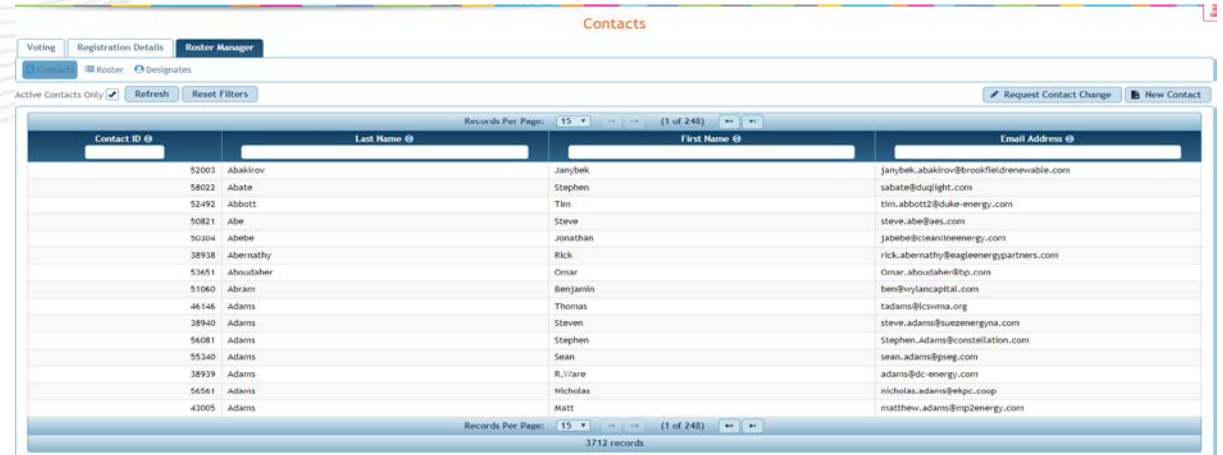
Contacts Roster Designates

Active Contacts Only Refresh Reset Filters Request Contact Change New Contact

Contact ID	Last Name	First Name	Email Address
52003	Abakirov	Janybek	janybek.abakirov@brookfieldrenewable.com
58022	Abate	Stephen	sabate@duqlight.com
52492	Abbott	Tim	tim.abbott2@duke-energy.com
50871	Abe	Steve	steve.abe@aec.rnm
50304	Abebe	Jonathan	jabebe@cleanlineenergy.com
38938	Abernathy	Rick	rick.abernathy@eagleenergypartners.com
53651	Aboudaher	Omar	Omar.aboudaher@bp.com
51060	Ahram	Benjamin	ben@vylancapital.rnm
46146	Adams	Thomas	LaAdams@lcwma.org
38940	Adams	Steven	steve.adams@suezenergyna.com
56081	Adams	Stephen	Stephen.Adams@constellation.com
55340	Adams	Sean	sean.adams@pseg.com
38939	Adams	R. VVare	adams@dc-energy.com
56561	Adams	Nicholas	nicholas.adams@ekpc.coop
43005	Adams	Matt	matthew.adams@mp2energy.com

Records Per Page: 15 (1 of 248) 3712 records

- The 'Contacts' tab contains all existing contacts of whom can be added to a roster
- The 'New Contact' button will allow for a Roster Manager to create a new contact
- The application will not allow for a duplicate contacts to be created with the same email address



- The Roster tab allows Roster Manager to see all 'Active' rosters for the companies they are designated as Roster Managers
- Select 'New Roster' and select the Company, Contact, Committee, Roster Type and Save to create a new roster
- Rosters will be pre-populated with current roster representation

Roster

Voting Registration Details **Roster Manager**

Contacts **Roster** Designates

Active Rosters Only Refresh Reset Filters New Roster

ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
70686	Egan	Amanda	51640	CCPPSTF	Mohitha's New Company	Primary	09/18/2018	
70684	McLavery	Megan	64741	MIC	Mohitha's New Company	Alternate	09/18/2018	
70683	Egan	Amanda	51640	CS	Mohitha's New Company	Primary	09/18/2018	
70682	Testor	Megan	64981	MIC	Mohitha's New Company	Alternate	09/18/2018	
70681	Testor	Megan	64981	MIC	Mohitha's New Company	Primary	09/18/2018	
70680	Testor	Megan	64981	MIC	Mohitha's New Company	Primary	09/18/2018	

Records Per Page: 15 (1 of 1) 6 records

Voting Registration Details **Roster Manager**

Contacts **Roster** Designates

Active Rosters Only Refresh Reset Filters New Roster

ID	Last Name	First Name	Contact ID	Committee	Member Name	Roster Type	Effective Date	Actions
70686	Egan	Amanda	51640	CCPPSTF	Mohitha's New Company	Primary	09/18/2018	
70684	McLavery	Megan	64741	MIC	Mohitha's New Company	Alternate	09/18/2018	
70683	Egan	Amanda	51640	CS	Mohitha's New Company	Primary	09/18/2018	
70682	Testor	Megan	64981	MIC	Mohitha's New Company	Alternate	09/18/2018	
70681	Testor	Megan	64981	MIC	Mohitha's New Company	Primary	09/18/2018	
70680	Testor	Megan	64981	MIC	Mohitha's New Company	Primary	09/18/2018	

Create Roster

Roster Info

Member Name: Mohitha's New Company

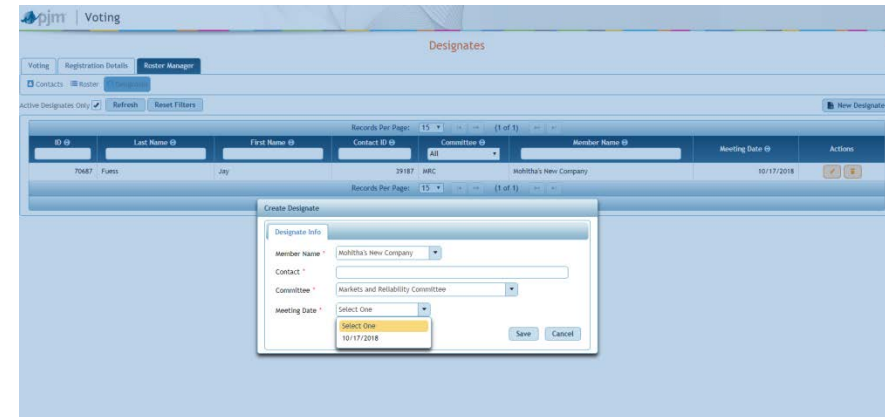
Contact:

Committee: Audit Advisory Committee

Roster Type: Primary

Save Cancel

- Roster Managers will be able to assign designated voters (proxies) for a single meeting through this page
- Meeting dates for specified committees will be prepopulated for Roster Managers to select from
- Contact Managers can search existing designations for their companies to quickly re-add proxies for future meetings of the same committee (uncheck 'Active Designates Only' box to search)



- For assistance using the Roster Manager functionality in the Voting Application, please email:
 - Amanda Egan – Amanda.Egan@pjm.com
 - Megan McLaverty – Megan.McLaverty@pjm.com
 - Membership Forms – MembershipForms@pjm.com
- PJM Staff will be available on site during meetings for further assistance