CAM Roles and Responsibilities

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Agenda

• Introduction and Purpose
• Existing CAM Roles and Responsibilities
• Membership Management Community
• Recertification Updates
• Documentation Updates
• Future Opportunities and CAM Feedback and Input
• Next Steps
PJM completed a holistic review of the following as it relates to the CAM role:

- Importance of role / Documentation
- Security, risk, process efficiencies
- Member responsibility
Existing Roles and Responsibilities of CAM

• Validate user accounts
• Set up user accounts as necessary
• Manage user accounts
  – Approve/remove tool access
  – Lock/unlock accounts
  – Reset passwords
  – Terminate users as appropriate
• Request additional tool access at the account level
• Manage Whitelist
Applications: An online membership enrollment tool.

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

Member Maintenance: An online feature for members to recertify member information and initiate member-level requests.

Available now

Available in 2020
Membership Management Community

• Member Maintenance feature to be rolled out in March 2020
  – Access is limited to an Officer or Authorized Representative
  – Functionality includes:
    • CAM updates
    • Subaccount requests
    • Annual CAM recertification
  – Existing CAM form B to retire
• CAM recertification process defined in Manual 33
  – CAM recertification
    • Must be completed by Officer or Authorized Rep
    • Recertification period: March 2020 to April 30, 2020 (30 days)
    • Non-compliance with recertification request will result in loss of all tool access for market participants
User Recertification

• User recertification process defined in Manual 33
  – User recertification
    • Must be completed by company CAM
    • Recertification period: June 2020 to July 31, 2020 (60 days)
    • Non-compliance with recertification request will result in loss of all tool access for market participants
• CAM roles and responsibilities to be defined in Manual 33: Administrative Services for the PJM Interconnection Operating Agreement.
  – Role of Officer/Authorized Rep
  – Lead/employee CAM
  – Adding/removing CAM(s) to/from an account
  – Establishing subaccount(s)
  – Utilizing Whitelist capabilities
• First read of updated Manual language – MRC on 1/23
• Endorsement of updated Manual language – MRC on 2/20
1Q 2020 efforts

- PJM to develop CAM Process Guide/Job Aid
- PJM to develop formalized training for new CAM(s)
- PJM to update Account Manager User Guide
Future Opportunities

- Enhance Account Manager to allow member(s) to have more control over the user management process
  - Locking/unlocking user accounts
  - Password resets
- Document PJM’s CAM administrator role as it relates to assisting members with these processes in Manual 33
Next Steps

• Provide additional feedback to camadmin@pjm.com
• Encourage CAMs to participate in upcoming training sessions
• Share who your CAMs are internally within company