CAM Roles and Responsibilities

Knowledge Management Center
January 2020
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. Available now

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

Member Maintenance: An online feature for members to recertify member information and initiate member-level requests. Available in 2020
• 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

- CAM recertification process defined in Manual 33
  - 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 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
Process Documentation Updates

• 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