

# Annual User Certification Quick Guide



June 2021

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# Annual User Certification Quick Guide

## Overview

For security purposes, PJM now requires CAMs to perform an annual review of users and their authorized access to ensure that all user accounts in Account Manager have the appropriate access authorizations and to certify that the users who have access are authorized to do business on behalf of their listed organization. CAMs will have a 60-day window from start to close to certify their users and accesses.

### Certify All User Relationships to the Member/Main Account for Members

- Any users that only have Account Manager read/write access will not be part of user certification and do not need to be certified.
- Changes made to user accounts and access permissions after the window opens are not reflected in this user certification period; however, the changes made will be part of next year's user certification.
- Account Manager displays the users' **Employed as** field, which the CAM can opt to leave as-is or update. The record cannot be saved with a blank **Employed as** field.
- Pop-up instructions will confirm that the **Employed as** field applies to the person's relationship to the Member/Main Account if the profile is associated with a subaccount.

### Certify System Account Accesses for All Members

- Only the accesses need to be certified for a System Account. The user relationship certification does not apply to System Accounts.

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## Who Can Certify Users and Their Accesses

- Single-account CAMs are able to certify users and their accesses for the company account that they manage.
- SUMA CAMs are able to certify users and their accesses for all company accounts that they manage.

**Please Note:** If you are not a CAM for the user's main account, you will only be able to certify the access of the user related to the company account(s) for which you are the CAM.

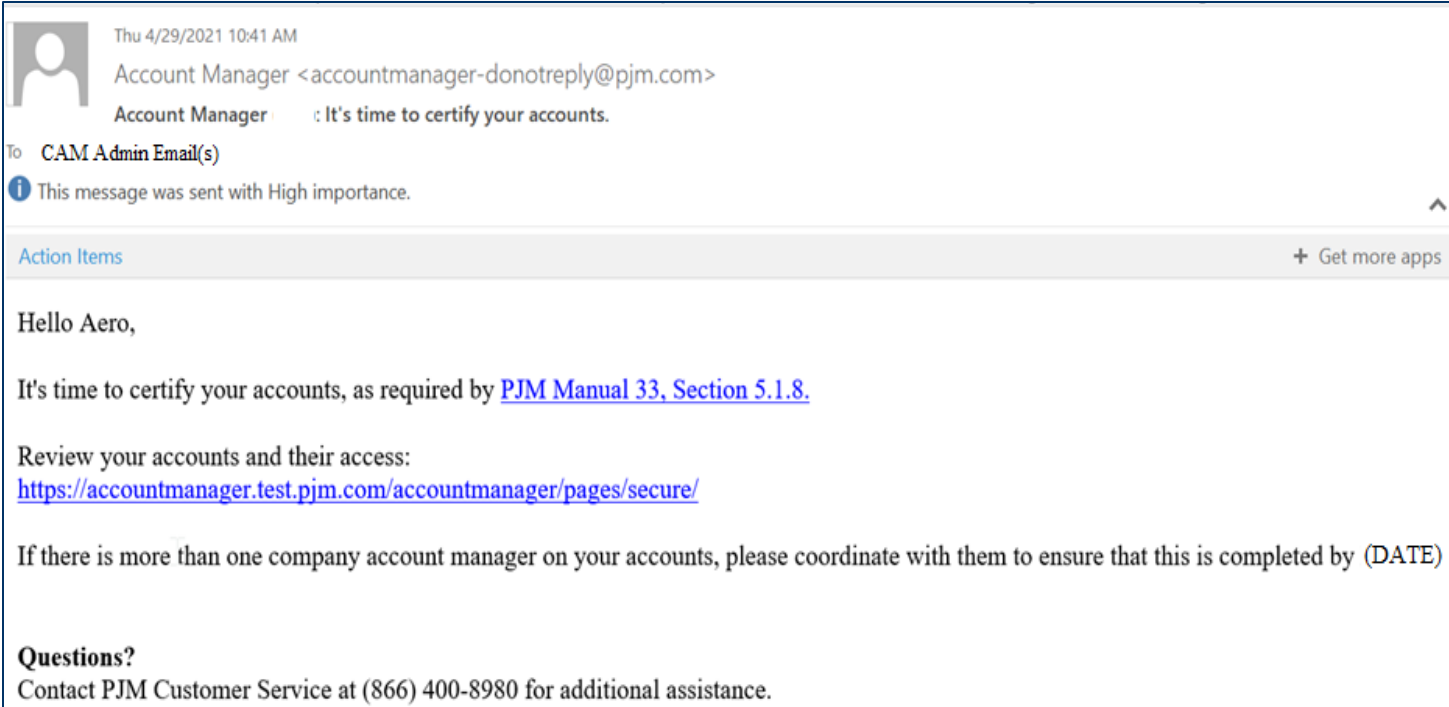
## Email Notifications for Certification Window Opening and Closing

All CAMs will receive email notifications when the annual user certification window opens and closes.

- CAMs will **only** be able to certify their users and accesses during this 60-day window.

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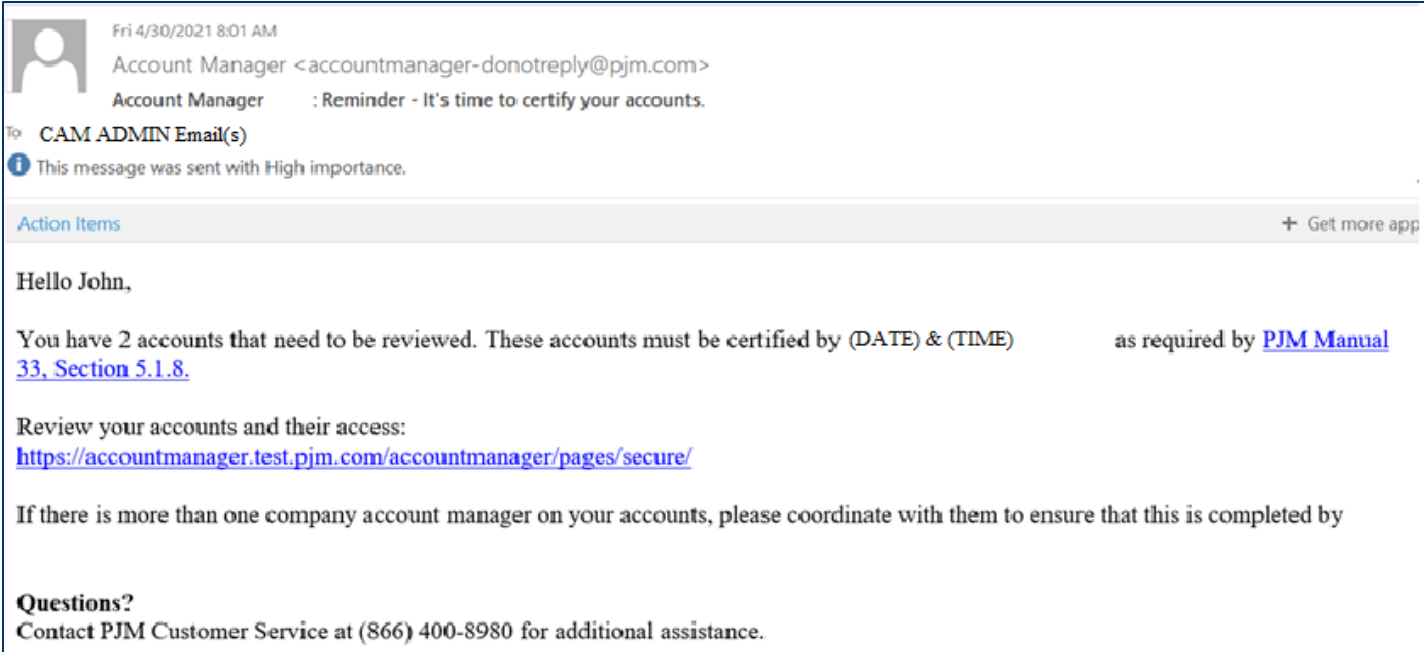
## Example Email Notification When Window Opens



The screenshot shows an email interface. At the top left is a grey profile icon. To its right, the text reads: 'Thu 4/29/2021 10:41 AM', 'Account Manager <accountmanager-donotreply@pjm.com>', and 'Account Manager : It's time to certify your accounts.' Below this is the recipient information: 'To CAM Admin Email(s)'. A blue information icon is followed by the text 'This message was sent with High importance.' and an upward-pointing arrow. A grey bar labeled 'Action Items' is on the left, and '+ Get more apps' is on the right. The main body of the email contains the following text: 'Hello Aero,', 'It's time to certify your accounts, as required by [PJM Manual 33, Section 5.1.8.](#)', 'Review your accounts and their access:', '<https://accountmanager.test.pjm.com/accountmanager/pages/secure/>', 'If there is more than one company account manager on your accounts, please coordinate with them to ensure that this is completed by (DATE)', 'Questions?', and 'Contact PJM Customer Service at (866) 400-8980 for additional assistance.'

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## Example Email Notification of Window Closure



The screenshot shows an email interface. At the top left is a grey profile icon. To its right, the text reads: "Fri 4/30/2021 8:01 AM", "Account Manager <accountmanager-donotreply@pjm.com>", and "Account Manager : Reminder - It's time to certify your accounts." Below this, it says "To: CAM ADMIN Email(s)" and "This message was sent with High importance." A grey bar labeled "Action Items" with a plus icon and "Get more app" is visible. The main body of the email starts with "Hello John," followed by "You have 2 accounts that need to be reviewed. These accounts must be certified by (DATE) & (TIME) as required by [PJM Manual 33, Section 5.1.8.](#)" It then says "Review your accounts and their access:" followed by the URL "<https://accountmanager.test.pjm.com/accountmanager/pages/secure/>". The next line reads "If there is more than one company account manager on your accounts, please coordinate with them to ensure that this is completed by". At the bottom, it says "Questions?" and "Contact PJM Customer Service at (866) 400-8980 for additional assistance."

Email notifications to CAMs regarding the window closing are sent at 15-days before, 7-days before and on the day of closing.

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## Getting Started

For user certification actions, sign in to your CAM or SUMA CAM user account. Next, click the **User Certification** tab, then either click the **Users** subtab or **System Accounts** subtab.

1. Click the **User Certification** tab.

The screenshot shows the 'Account Manager' interface for 'User Certification - Users'. The 'User Certification' tab is selected and highlighted with a blue box. Below it, the 'Users' subtab is also highlighted with a blue box. The interface includes a search bar and a table with columns for Actions, First Name, Last Name, Username, Email, Employer, Employed as, and Certification Date. The table is currently empty, displaying 'No records found.' and a pagination control showing 'Records Per Page: 15' and '0-0 of 0 records'.

2. Click either the **Users** or **System Accounts** subtab to begin.

You will need to certify your users and their accesses under both subtabs.

## How to Certify Users and Accesses for User and System Accounts

### Search and Filtering Tips: User Certification Screen

- You cannot use “wildcards,” so if you are searching for all users with a first name that starts with the letter “J,” type J (no asterisk following the letter) in the **First Name** search box and hit **Enter**.
- You can filter alphabetically or numerically by using the ascending- or descending-order arrows in the **First Name, Last Name, Username, Email, Employer, Employed as** or **Certification Date** fields.

The **Employed as** field must be complete before you can certify your users. The certify **check mark** box will remain inactive until selected. Except for SUMA CAMs, if you are not a CAM for the main company account, you will not be able to change the **Employed as** field.

### Employed as Field Definitions

- **Agent** – An entity or individual, not an employee of the Member, that performs actions or functions on behalf of the Member required under any PJM governing document, as designated in a PJM form of agreement authorizing PJM to deal with the Agent on behalf of the Member, including but not limited to a Declaration of Authority, license agreement, data sharing agreement, or consulting agreement. The actions of the Agent on behalf of Member shall be legally binding on the Member. The Member shall accept all responsibility, and be liable, for the receipt of information by the Agent or the provision of information to PJM by the Agent.
- **Consultant** – An entity or individual, not an employee of the Member who the Member has authorized PJM to share information with on its behalf as designated in a PJM form of agreement, including but not limited to a data sharing agreement or consulting agreement. The actions of the Consultant on behalf of the Member shall be legally binding on the Member. The Member shall accept all responsibility, and be liable, for the receipt of information by the Consultant or the provision of information to PJM by the Consultant.
- **Employee** – An employee of a Member.
- **Contractor** – An independent contractor or temporary worker of a Member.



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## User Accounts Certification Tab

User Certification - Users

User Certification | Pending Tasks | Add New User | User Profile | My Company | Search

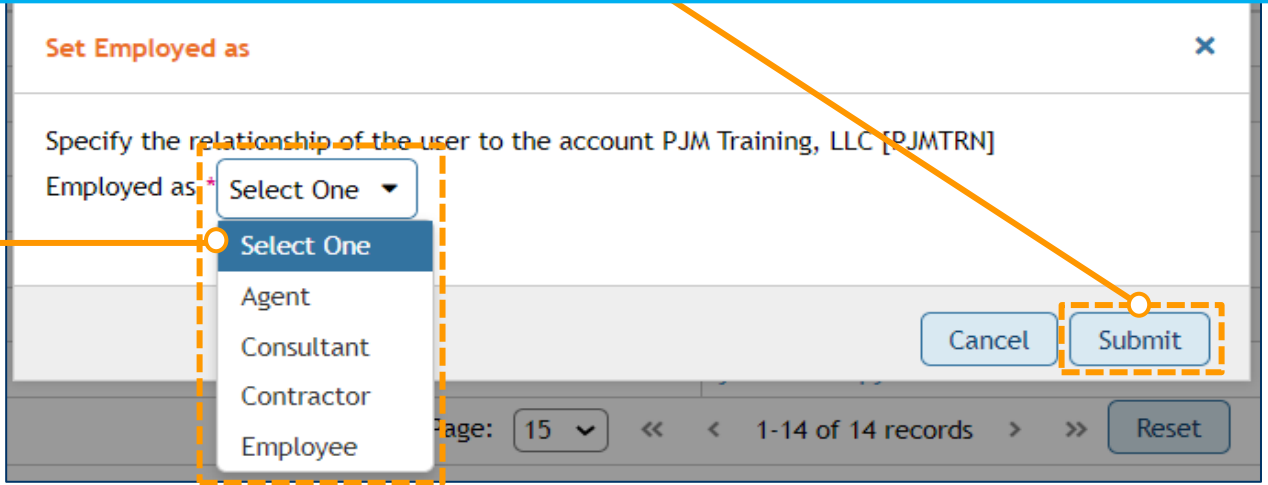
Users | System Accounts

Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
<input checked="" type="checkbox"/>	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMO]		
<input checked="" type="checkbox"/>	Jeremy	Clarkson	JClarkst	jc@pjm.com	PJM TEST Company	Contractor	
<input checked="" type="checkbox"/>	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]		
<input checked="" type="checkbox"/>	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	PJM Training, LLC (SUB 1) [PT]		
<input checked="" type="checkbox"/>	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	PJM Training, LLC [PJMTRN]		
<input checked="" type="checkbox"/>	Nellie	Crawford	NRCtst123	nellie@pjm.com	PJM Training, LLC [PJMTRN]	Contractor	
<input checked="" type="checkbox"/>	Justin	Crow	JCSTG3522	justin.crow@pjm.com	PJM Training, LLC [PJMTRN]		

1. In the *Actions* column, click the **pencil** icon to select the user's relationship to the main member company account if it is not currently populated or needs to be updated.

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2. In the **Set Employed as** pop-up box, click the drop-down arrow to select the user's relationship to the member company account, then click **Submit**.



3. Now you will be able to certify the user and their accesses. Next, click the **magnifying glass** icon to review the user's company account(s) and their accesses.

User Certification	Pending Tasks	Add New User	User Profile	My Company	Search		
Users	System Accounts						
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [P]	Employee	

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On the **Active Access** pop-up screen, you can:

4. View Active Access

5. Terminate access by clicking the **trash can** icon in the *Actions* column, next to the access that needs to be removed.

6. Click the **User Profile screen** link to make updates to their profile information.

**Active Access** [Close]

Below is the active access that JCHYBRIDSCAM has under the PJM Training, LLC (SUB 2) [PTSUB2] account. Access can be removed below, if needed, and other updates can be made on the [User Profile screen](#).

Tool	Access Type	Actions
PJM	Public	
Member Community	Public	
Markets Gateway	Generator Read Write	
Resource Tracker	Read/Write	
Markets Gateway	Generator Read Only	
MSRS	Read Only	



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After reviewing the user and their accesses:

7. Click the **check mark** icon in the *Actions* column to certify the user and their accesses.

User Certification							
Pending Tasks Add New User User Profile My Company Search							
Users System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
<input checked="" type="checkbox"/>  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]	Employee	

You should now see the date populated in the *Certification Date* column for this user.

User Certification							
Pending Tasks Add New User User Profile My Company Search							
Users System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
<input checked="" type="checkbox"/>  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]	Employee	06/07/2021

Repeat this workflow for each additional user on your user certification list.

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## SUMA CAMs

When you see a user's name in black font (instead of blue), this means you are a CAM for that user but not for their main company account. You still need to certify the user's access that pertains to your company account(s). Please follow the process below for these users.

User Certification - Users

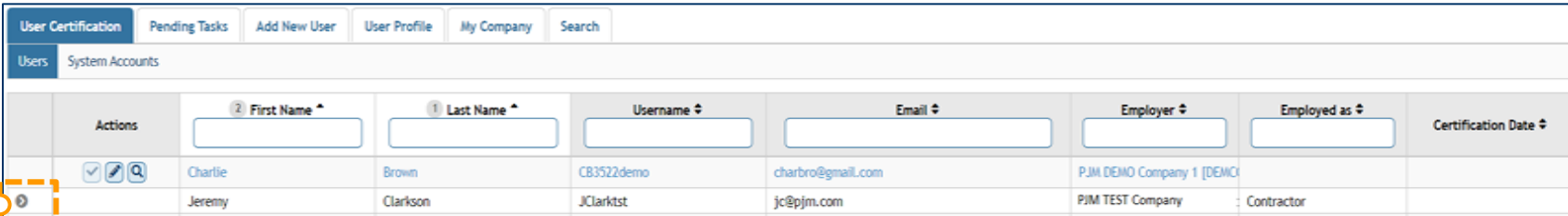
User Certification Pending Tasks Add New User User Profile My Company Search





Users System Accounts

Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
  	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMO]		
	Jeremy	Clarkson	JClarktst	jc@pjm.com	PJM TEST Company	Contractor	
  	Julissa	Craven	JCHYBRIDSCAM	j.craven@pjm.com	PJM Training, LLC (SUB 2) [PT]		
  	Julissa	Craven	JCSTGMERGE2	j.craven@pjm.com	PJM Training, LLC (SUB 1) [PT]		
  	Julissa	Craven	JCSTGMERGE	j.craven@pjm.com	PJM Training, LLC [PJMTRN]		
   	Nellie	Crawford	NRCtst123	nellie@pjm.com	PJM Training, LLC [PJMTRN]	Contractor	
  	Justin	Crow	JCSTG3522	justin.crow@pjm.com	PJM Training, LLC [PJMTRN]		

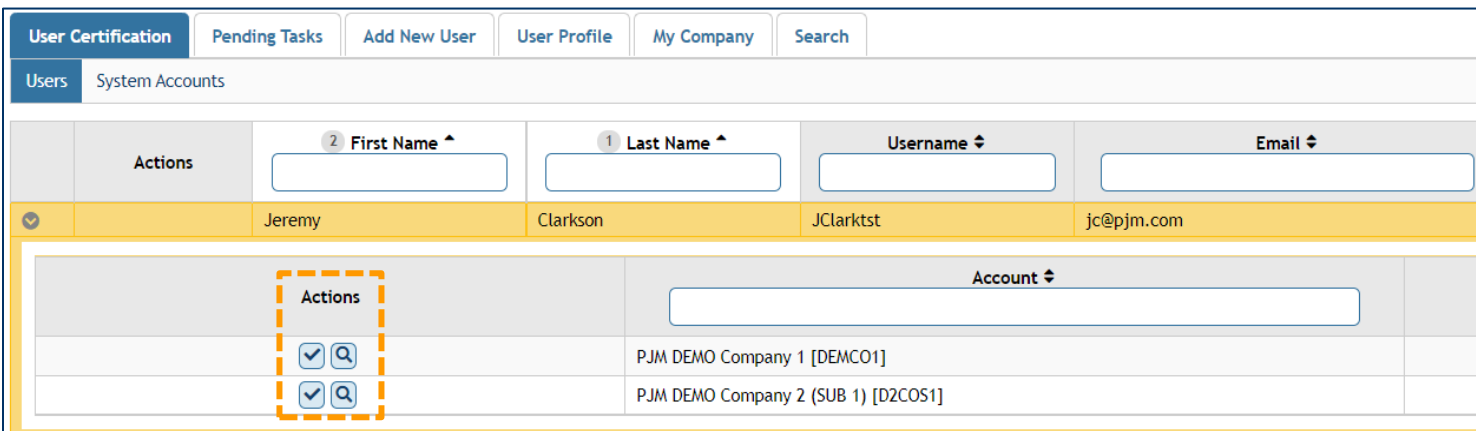
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1. Click the drop-down arrow in the first column.



Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
 	Charlie	Brown	CB3522demo	charbro@gmail.com	PJM DEMO Company 1 [DEMO]		
 	Jeremy	Clarkson	JClarktst	jc@pjm.com	PJM TEST Company	Contractor	

2. From the expanded rows view, you will see the company accounts for which you are a CAM. In the *Actions* column, either certify the user by clicking the **check mark** icon or review their accesses by clicking the **magnifying glass** icon.



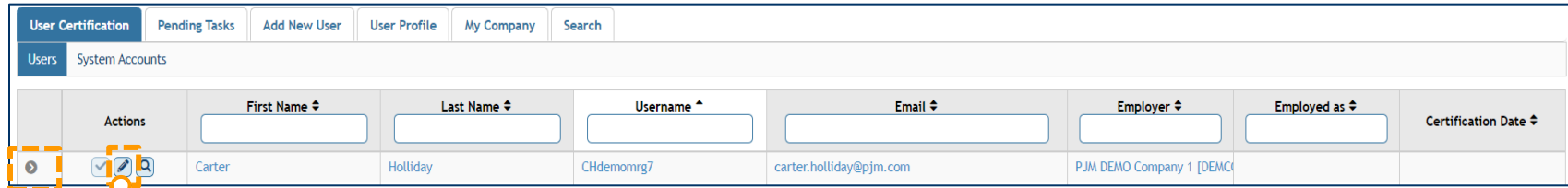
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕
	Jeremy	Clarkson	JClarktst	jc@pjm.com
<b>Actions</b>	<b>Account ↕</b>			
 	PJM DEMO Company 1 [DEMCO1]			
 	PJM DEMO Company 2 (SUB 1) [D2COS1]			


When you click the **magnifying glass** icon, you will be able to view active accesses, terminate accesses or view the user's profile page before you certify the user. Click the **check mark** icon for each account to complete the certification.

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## SUMA User Accounts

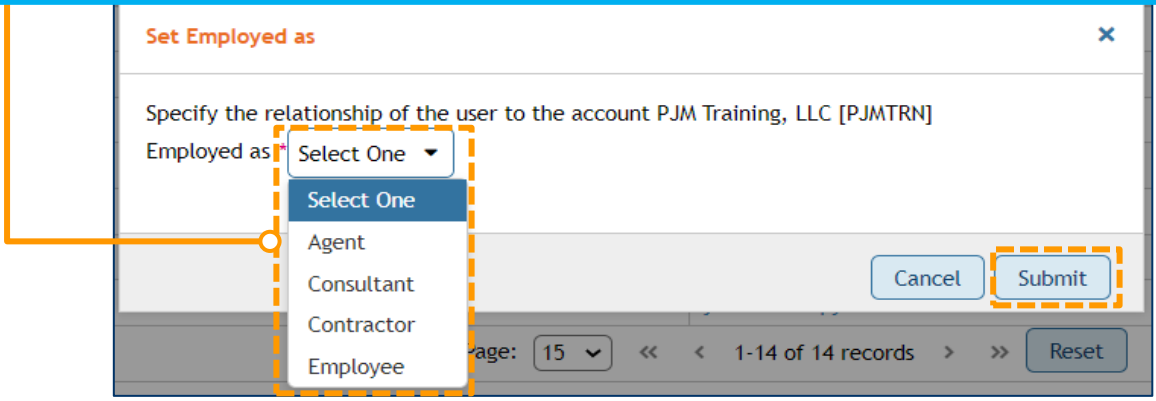
For users (in blue) that are associated with more than one company account, you will also see the drop-down arrow in the first column.



Actions	First Name ↕	Last Name ↕	Username ^	Email ↕	Employer ↕	Employed as ↕	Certification Date ↕
	Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	PJM DEMO Company 1 [DEMO]		

1. Click the **pencil** icon to complete the **Employed as** field as needed.

2. In the **Set Employed as** pop-up box, click the drop-down arrow to select the user's relationship to the member company account, then click **Submit**.



**Set Employed as** [Close]

Specify the relationship of the user to the account PJM Training, LLC [PJMTRN]

Employed as: Select One ▾

- Select One
- Agent
- Consultant
- Contractor
- Employee

Cancel Submit

Page: 15 ▾ << < 1-14 of 14 records > >> Reset

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3. Select the **magnifying glass** icon in the yellow banner to review access for the main company. A new pop-out box will list the access. From the pop-out box you can review active access, terminate accesses or click the link to the user profile to view their profile information.

Actions	First Name	Last Name	Username	Email	Employer	Employed as	Certification Date
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Carter	Holliday	CHdemomrg7	carter.holliday@pjm.com	PJM DEMO Company 1 [DEMC]	Employee	

Actions	Account	Certification Date
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	PJM DEMO Company 2 (SUB 2) [D2COS2]	

4. Select the **magnifying glass** icon in the *Actions* column to review accesses for the secondary account(s). From the pop-up box, you can review active accesses, terminate accesses or click the link to view the user's profile.

5. Click the **check mark** icon in the *Actions* column for each secondary account, then click **Yes** in the pop-up box to complete subaccount user certification.

6. Click the **check mark** icon in the yellow banner, then click **Yes** in the pop-out box to complete the main account user certification.



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## System Accounts Certification Tab

1. Click the **User Certification** tab, then click the **System Accounts**

User Certification							
Pending Tasks Add New User User Profile My Company Search							
Users System Accounts							
Actions	2 First Name ^	1 Last Name ^	Username ↕	Email ↕	Employer ↕	Certification Date ↕	
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jackson	Copenhagen	JACTESTSYS	jc@pjm.com	PJM DEMO Company 1 [DEMCO1]		
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jac	Fraggles	JACTEST0987	dmi2ops@pjm.com	PJM DEMO Company 2 [DEMCO2]		
<input checked="" type="checkbox"/> <input type="checkbox"/>	Jill	Hansen	JillHansen	Jhansen@pjm.com	PJM DEMO Company 2 [DEMCO2]		

Please follow the user certification workflows above whether it is a single System Account or a SUMA System Account. The only exception is you will not have to set the **Employed as** field first before reviewing and certifying System Accounts.