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Contact Management

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Create a Case

Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Actions	Last name	First name	Member	Role	Type
	Search	Search	All	All	All
	Morris	Luz	Voting Member 1	Affiliate Disclosure Signer	Primary
	O'Brien	See	Voting Member 1	Affiliate Disclosure Signer	Alternate

Create and assign contacts with associated roles.

Search by first or last 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 **Role Definitions** for descriptions of roles.

To add or remove a Contact Manager, select the **Attestation Form** and submit to PJM.

Select the **Unassigned Member Roles** tab to view roles that haven't been assigned.

Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Member	Role	Type
Voting Member 5	Affiliate Disclosure Signer *	alternate
Voting Member 1	Authorized Representative	
Voting Member 5	Credit	alternate
Voting Member 5	Information Technology *	Primary
Voting Member 5	Officer Certification Form *	alternate
Voting Member 5	Officer of the Company *	Primary

Select the **Contacts** tab to view all contacts.

Edit contact information or delete all roles for contact.

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

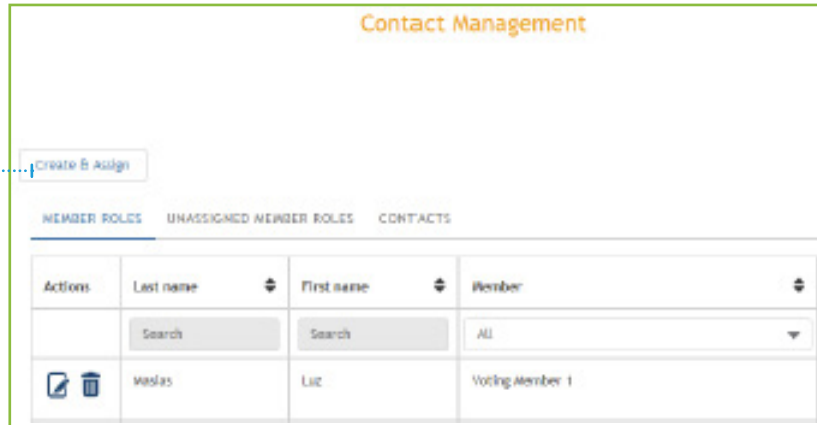
Create & Assign

MEMBER ROLES UNASSIGNED MEMBER ROLES CONTACTS

Actions	Last name	First name	Member	Employer	Title	Email	Phone
	Search	Search	All	All	Search	Search	Search
	Boyle	May	Voting Member 1		VP	vbo@pjm.com	6109551213
	Boyle	Didi	Voting Member 5		VP	dbo@pjm.com	6109551414
	Contact	Harry	Voting Member 5		Vice President	hco@pjm.com	(605) 996-3963

Sort by column.

Filter by column.



The screenshot shows the 'Contact Management' interface. At the top, there is a 'Create & Assign' button. Below it are three tabs: 'MEMBER ROLES', 'UNASSIGNED MEMBER ROLES', and 'CONTACTS'. The 'CONTACTS' tab is active, displaying a table with columns for 'Actions', 'Last name', 'First name', and 'Member'. A search bar is located above the table. One contact is listed: 'Marias' with 'Luz' as the first name and 'Voting Member 1' as the role.

Select **Create & Assign** to create contacts and assign roles.

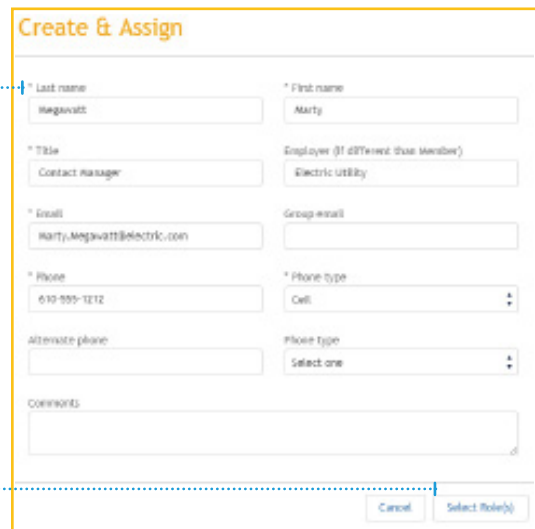


This dialog box is titled 'Create & Assign Contact'. It contains a text input field with the placeholder 'Create contact or search by email...'. At the bottom, there are 'Cancel' and 'Create Contact' buttons.

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 the contact does not exist, select **Create Contact**.

After selecting **Create Contact**, fill in all fields noting (*) are required.

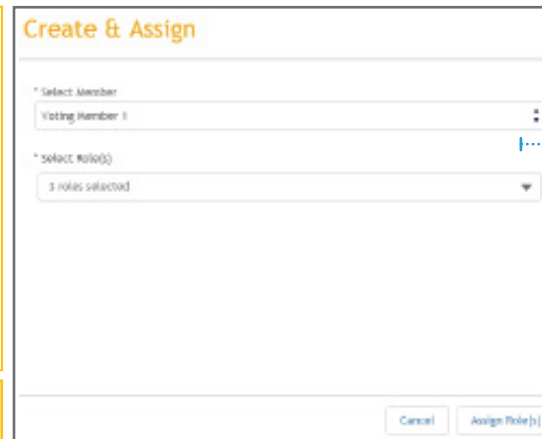


This form is titled 'Create & Assign' and contains the following fields:

- Last name: megawatt
- First name: Marty
- Title: Contact manager
- Employer (if different than Member): Electric utility
- Email: Marty.Megawatt@electric.com
- Group email: (empty)
- Phone: 610-999-1212
- Phone type: Cell
- Alternate phone: (empty)
- Phone type: Select one
- Comments: (empty)

 At the bottom, there are 'Cancel' and 'Select Role(s)' buttons.

After the fields have been updated, click on **Select Role(s)**.



This dialog box is titled 'Create & Assign'. It shows a dropdown menu for 'Select Member' with 'Voting Member 1' selected. Below it is a dropdown for 'Select Role(s)' with '3 roles selected'. At the bottom, there are 'Cancel' and 'Assign Role(s)' buttons.

After clicking Select Role(s), select member company from drop down, select all roles that apply, click **Apply** then select **Assign Role(s)**.



This form is titled 'Create & Assign' and shows the role assignment for 'Voting Member 1'. It has three sections:

- Authorized Representative: Primary (selected), Alternate
- Billing: Primary, Alternate (selected)
- Compliance: Primary, Alternate (selected)

 At the bottom, there are 'Cancel' and 'Save' buttons.

To assign roles, select **Primary** or **Alternate** for each role. If the role has already been assigned to another contact, you will not be able to select a role. Click **Save**.