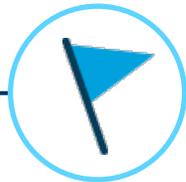




# Annual Member Recertification

Suzanne Coyne, Sr. Lead  
Anita Patel, Manager  
Knowledge Management Center  
Members Committee  
January 27, 2021

Action Required	Deadline	Who May Be Affected
Complete Annual Member Recertification Items	04/15/2021	All Full Members
Complete Annual Officer Certification Form	04/30/2021	All Market Participants







- Full Members required to validate the following information annually
  - Sector Selection
  - Affiliate Disclosure Information
  - Related Party Information (Electric Distributor sector only)
  - Contact Managers
  - Company Account Manager (CAMs)
- Must be completed by a designated Officer, Authorized Representative, or Maintenance Manager
- Process defined in [Manual 33](#), Section 3

- Market Participants required to provide the following information
  - Annual Officer Certification Form
    - Must be completed by an Officer
    - Required each calendar year between January 1 and April 30
  - Principals
    - Utilized for Know Your Customer (KYC) processes (on-going)
- Per compliance with PJM Tariff, Attachment Q

- Membership Management Community - Tool Enhancements
  - Sector Selection
    - Supporting questions and documentation if requesting a change
  - Principals
    - Submit top 5 Principals
  - Officer Certification Form
    - Ability to access from Membership Management Community
    - Initiates DocuSign process

# Recertification Tasks and Timeline

Required Tasks	Tool	Open Date	Due Date	Must be completed by
<ul style="list-style-type: none"> <li>• Sector Selection</li> <li>• Affiliate Disclosure</li> <li>• Related Parties</li> <li>• Contact Managers</li> <li>• CAMs</li> <li>• Principals*</li> </ul>	Membership Management Community	March 1	April 15	<ul style="list-style-type: none"> <li>• Officer</li> <li>• Authorized Representative</li> <li>• Maintenance Manager</li> </ul>
Officer Certification Form*	<ul style="list-style-type: none"> <li>• eCredit (prior to March 1<sup>st</sup>)</li> <li>• Membership Management Community (after March 1<sup>st</sup>)</li> </ul>	Jan 1	April 30	Officer

\* Market Participants only

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## Annual Member Recertification Process



### Member Hotline

(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com

# Appendix

- [Membership Management Community tool page](#)
- Changes to Officers, Authorized Representatives, or Maintenance Managers
  - [Form of Secretary Certificate FAQ](#)
  - [Form of Secretary Certificate](#) – Add designations
  - [Officer, Authorized Rep, Maintenance Manager Designation Form](#) – Add and revoke designations
- Annual Member Recertification [User Guide](#)