

Membership Management Community and Account Manager (CAM) Updates

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Membership Management



Community



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

Action Required	Deadline	Who May Be Affected
Share this information internally	Ongoing	All Members
Complete Secretary Certificate	Jan. 31, 2020	Officer of Member/Authorized Rep
Review details of this presentation	Ongoing	Contact Manager
Participate in upcoming training sessions	Jan. 2020	CAM, Authorized Rep, Officer



- Member Maintenance features include:
 - Company name change requests
 - Membership withdrawal requests
 - Affiliate disclosure updates
 - Voting member changes
 - Member affiliate changes
 - Non-member affiliate changes
 - Related Party updates (applicable to voting members in the ED sector)
 - Company Account Manager (CAM) updates
 - Subaccount requests
 - Contact Manager updates

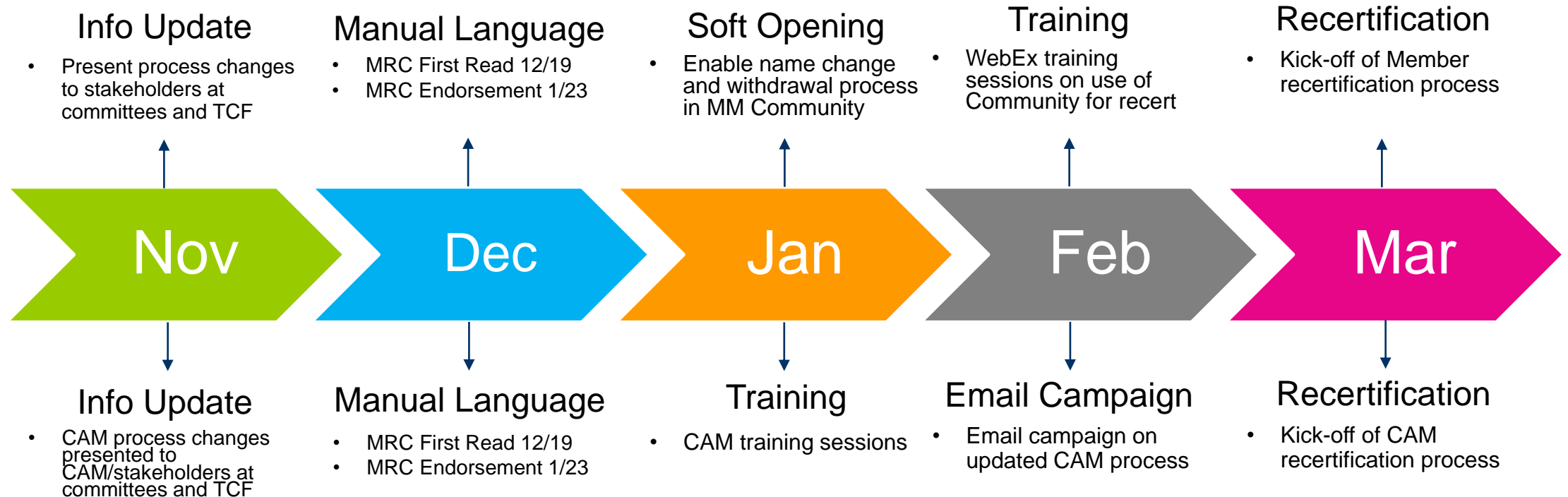
- Annual Member recertification process: members are required to validate the following information annually
 - Sector Selection
 - Affiliate Disclosure
 - Related Party
 - Contact Managers
 - Company Account Managers (CAMs)
- Recertification opens in mid-March and closes on April 30.

- Access to Member Maintenance feature will be available to an Officer of the Member or an Authorized Representative
 - New form sent to members on December 11 for completion to set up access to Member Maintenance feature
- Contact Manager attestation form to retire in March 2020
 - Contact Manager changes must be initiated through Member Maintenance
 - Contact Managers will no longer be able to update the Officer or Authorized Rep role for the members they represent

- Company Account Managers (CAMs)
 - Manage users
 - Validate users
 - Reset passwords
 - Lock/unlock accounts
 - Provision tool access
 - Maintain whitelist
 - Request additional tool access at account level

- Manual 33: Administrative Services for the PJM Interconnection Operating Agreement
 - *New Process/Requirements*
 - Role of Officers/Authorized Rep (Sign-off, etc.)
 - Membership Maintenance items
 - Role of CAMs
 - Lead CAMs and Member CAMs
 - Same CAMs across accounts/subaccounts
 - New Recertification Requirements
 - CAM Recertification (Membership Management Community – Officer/Authorized Rep)
 - User Recertification (Account Manager - CAM)
 - Non-compliance with regard to recertification requests

Member Maintenance



CAM